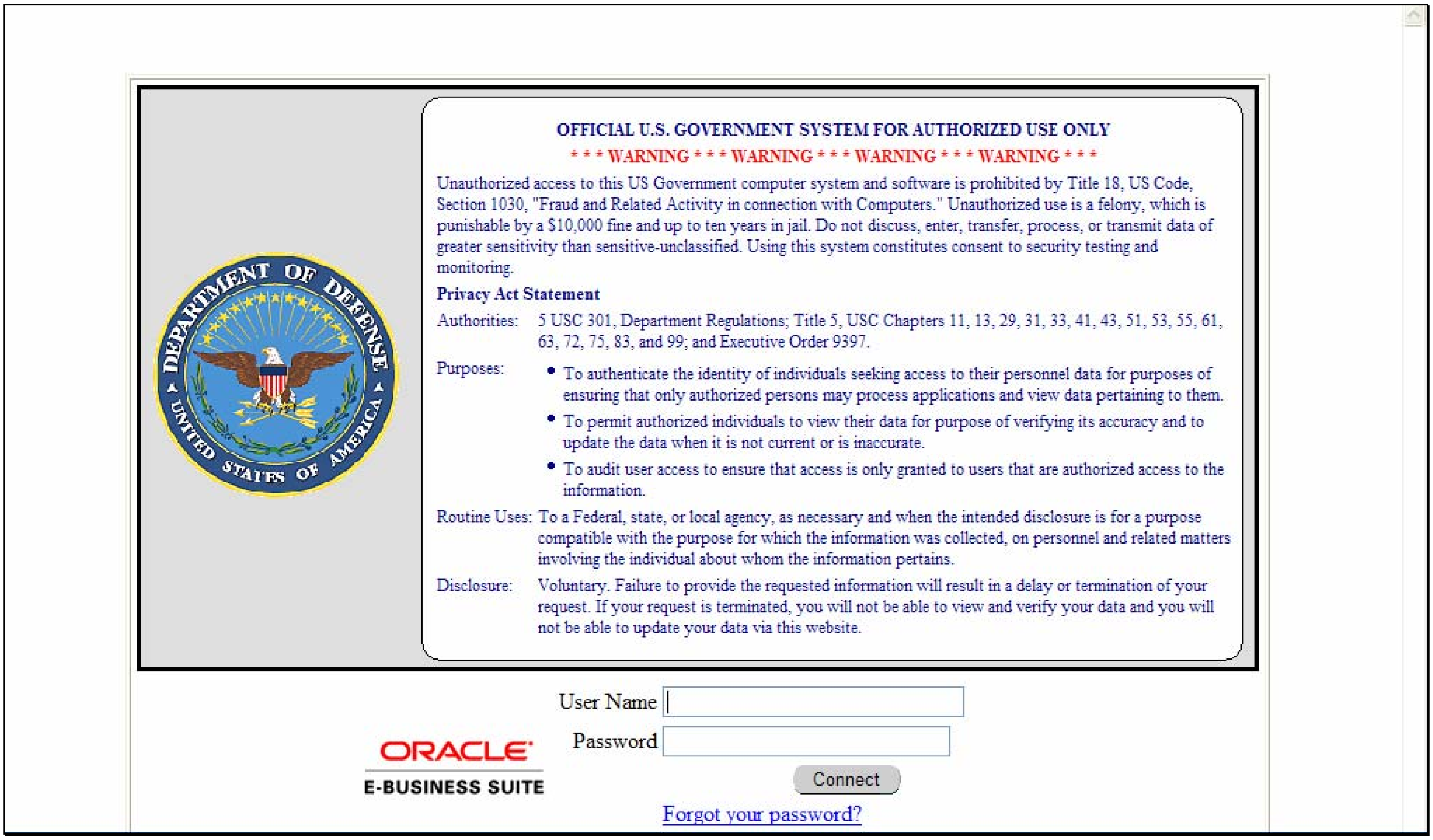

**Text Captions**

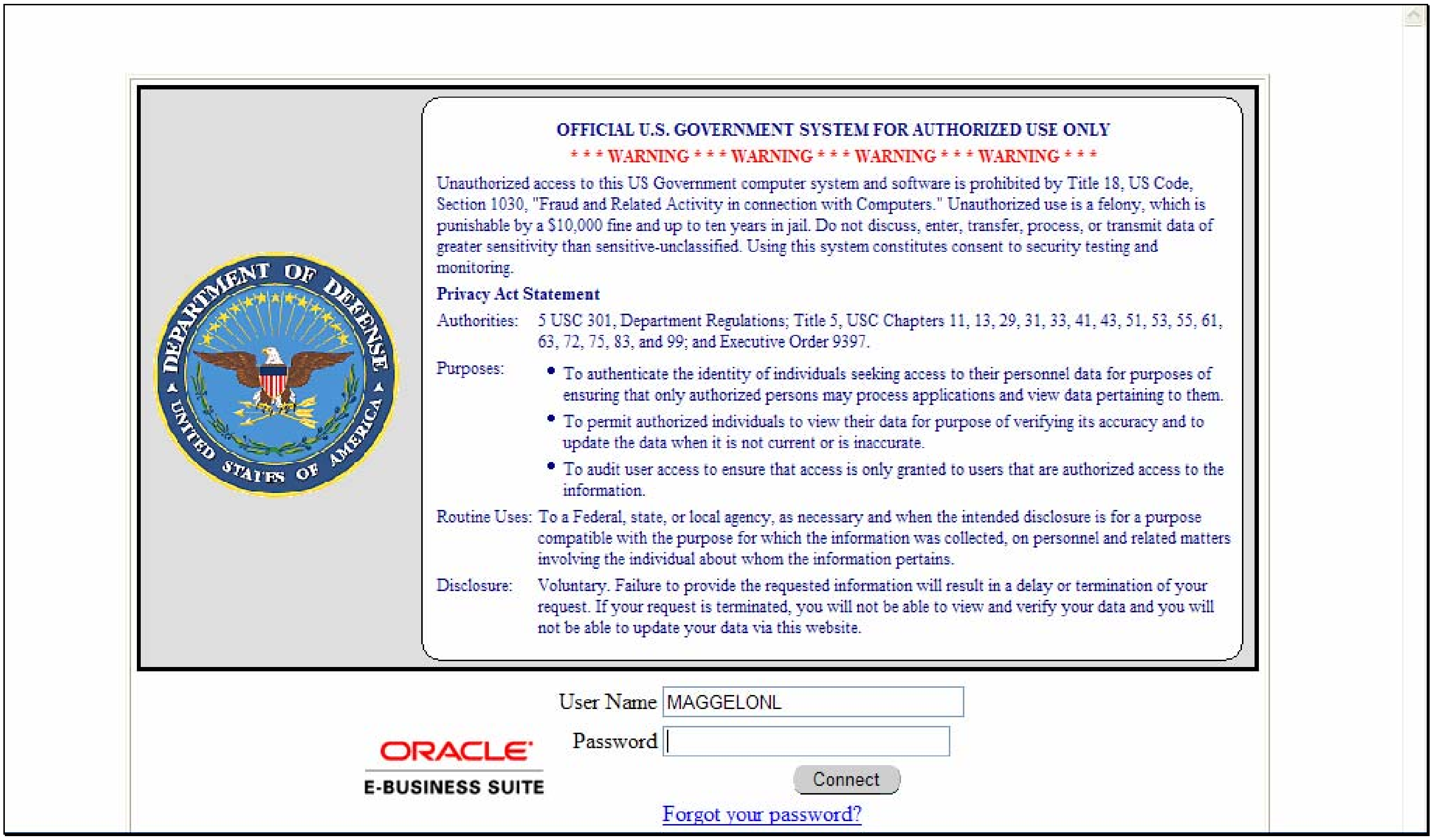
Logging on as a rating official and initiating a performance plan.




**Text Captions**

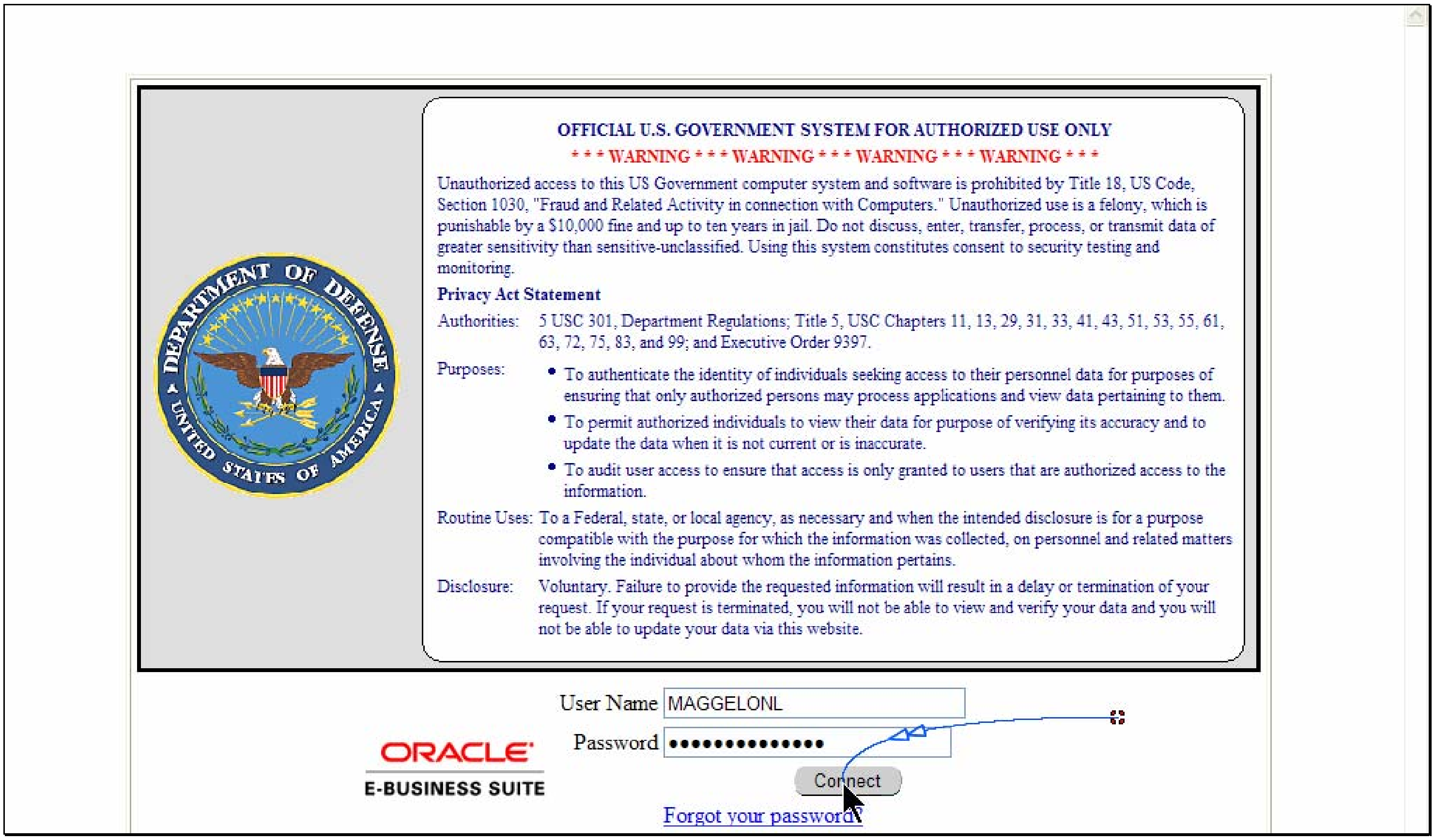
For the purpose of this demonstration, first we will log on as a rating official. Luke Maggelon is a supervisor for the Engineering Systems Management Office. He supervises five employees.

To begin, Luke logs on to My Workplace at a URL provided by his Component. He enters his user name and password.



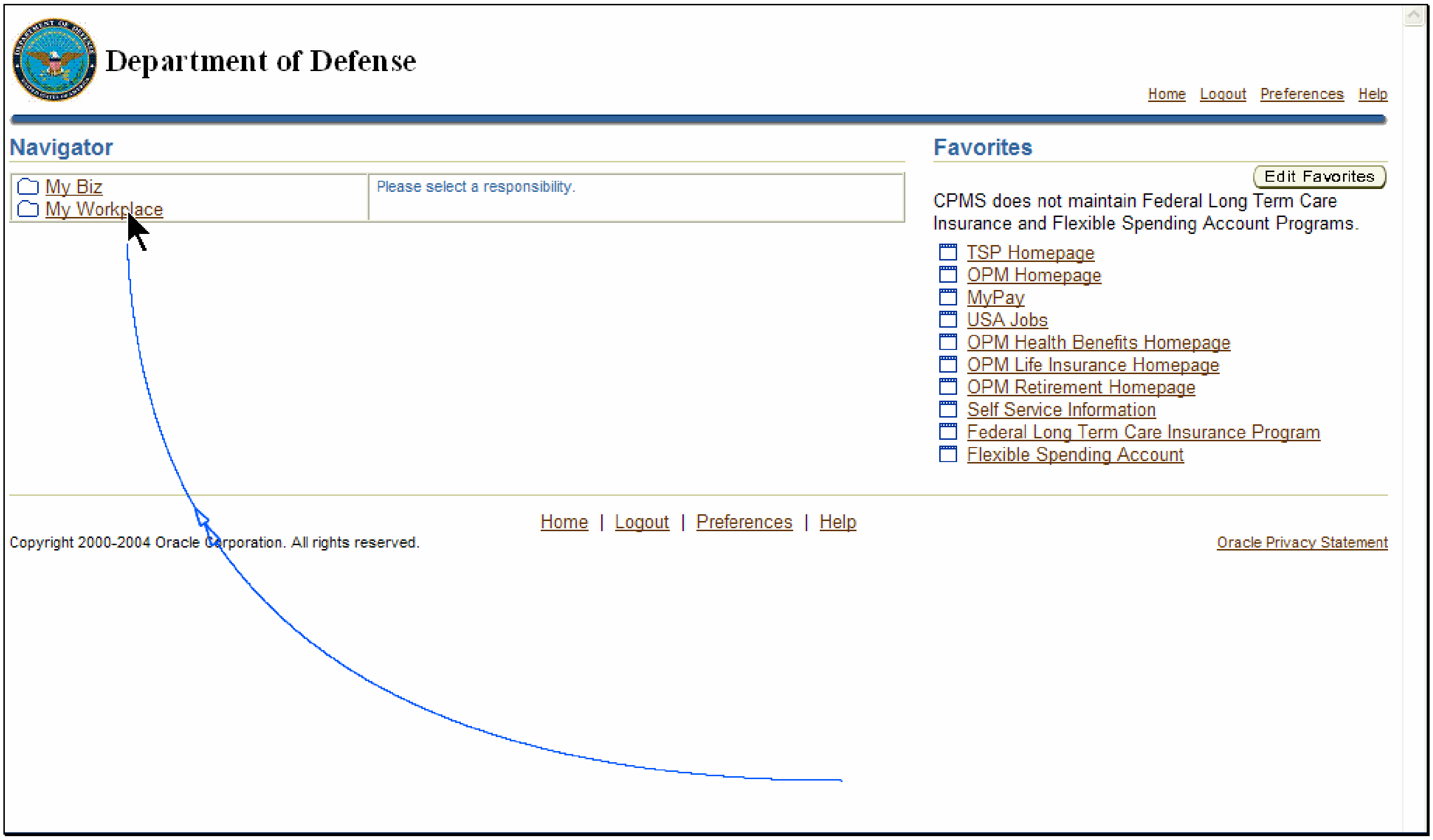

**Text Captions**

To begin, Luke logs on to My Workplace at a URL provided by his Component. He enters his user name and password.



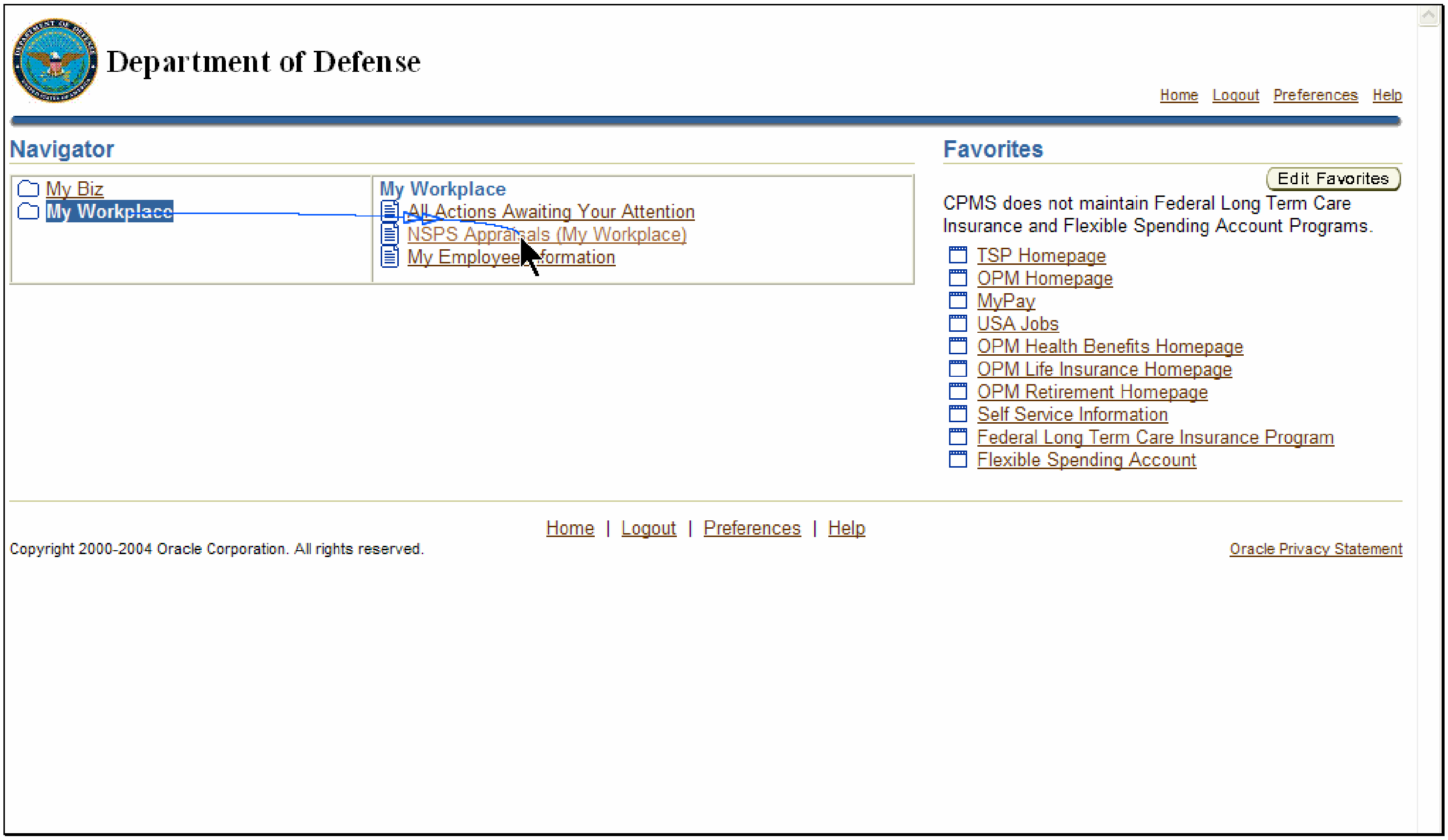

**Text Captions**

He then selects **Connect**.




**Text Captions**

He selects **My Workplace,** then **NSPS Appraisals (My Workplace).**




**Text Captions**

He selects **My Workplace,** then **NSPS Appraisals (My Workplace).**

Department of Defense
Performance Appraisal Application

Home Logout Preferences Help

Notifications Appraisals

Rating Official

Performance Management As Rating Official

View All Appraisals By Employee

Plans/Appraisals in Progress

Create Performance Plan Go

| Initiator | Employee | Appraisal Effective Date | Status | Participation Status | Details | Appraise | Delete | Print |
|---|---|---|---|---|---|---|---|---|
| Maggelon, Luke | Zeigler, Adam | 01-Jan-2008 | Transferred | Open | | | | |

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee
Last Name, Title First Name
Appraisal Effective Date
(example: 19-Aug-2006)
Appraisal Type
Go Clear

| Employee | Appraisal Effective Date | Rating Cycle Start Date | Rating Cycle End Date | Appraisal Type | Details | Delete |
|---|---|---|---|---|---|---|
| No data exists. | | | | | | |

View All Appraisals By Employee

Notifications | Appraisals | Home | Logout | Preferences | Help

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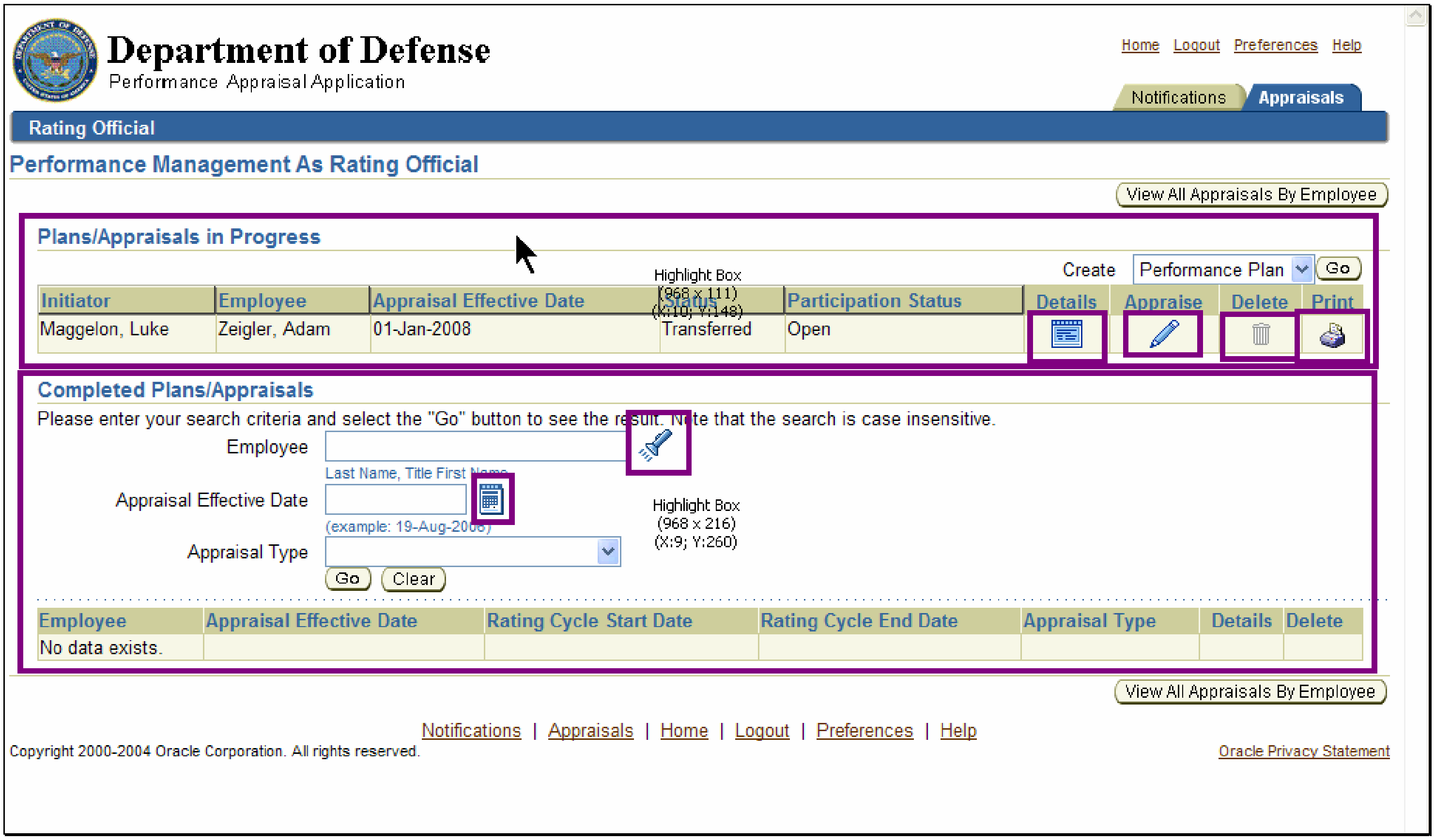
**Text Captions**

From here, Luke is directed to the *Rating Official - Performance Management as Rating Official* page. Let's take a moment to review the icons that he, and you, will need to become familiar with to complete a performance plan.




**Text Captions**

Selecting the Find icon opens a Find window, allowing you to search for information.

Selecting the Details icon displays read-only information.

Selecting the Print icon prints the current information.

Selecting the Pencil icon in the inactive state does not allow you to update information. This usually implies that you do not have ownership of the appraisal. The ownership concept is covered later in this lesson.

Selecting the Pencil icon in the active state allows you to update information. This usually implies that you have ownership of the appraisal.

Selecting the Delete icon in the inactive state does not allow you to delete information. Selecting the Delete icon in the active state allows you to delete information.

Selecting the Calendar icon displays a thumbnail of a calendar, allowing you to select a date. This is associated with date fields only.

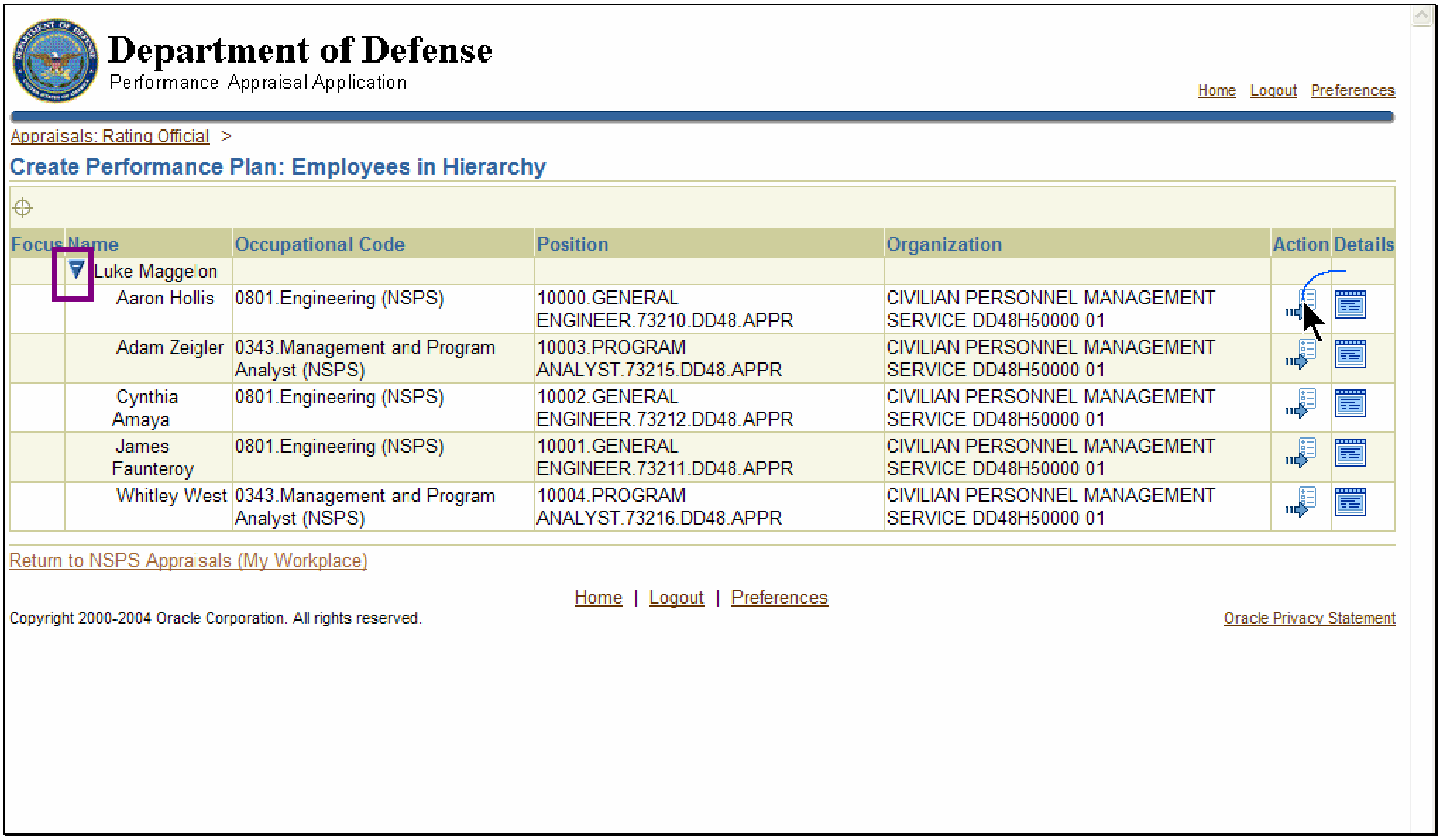
Okay, now that you are familiar with the icons, let's take a look at what is on this page. There are two areas for you to note:

One area is Plans/Appraisals in Progress that contains active appraisals created by the rating official.

The second area is Completed Plans/Appraisals that contains appraisals that have gone through the entire appraisal process.


**Text Captions**

To get started, Luke selects **Create Performance Plan**.

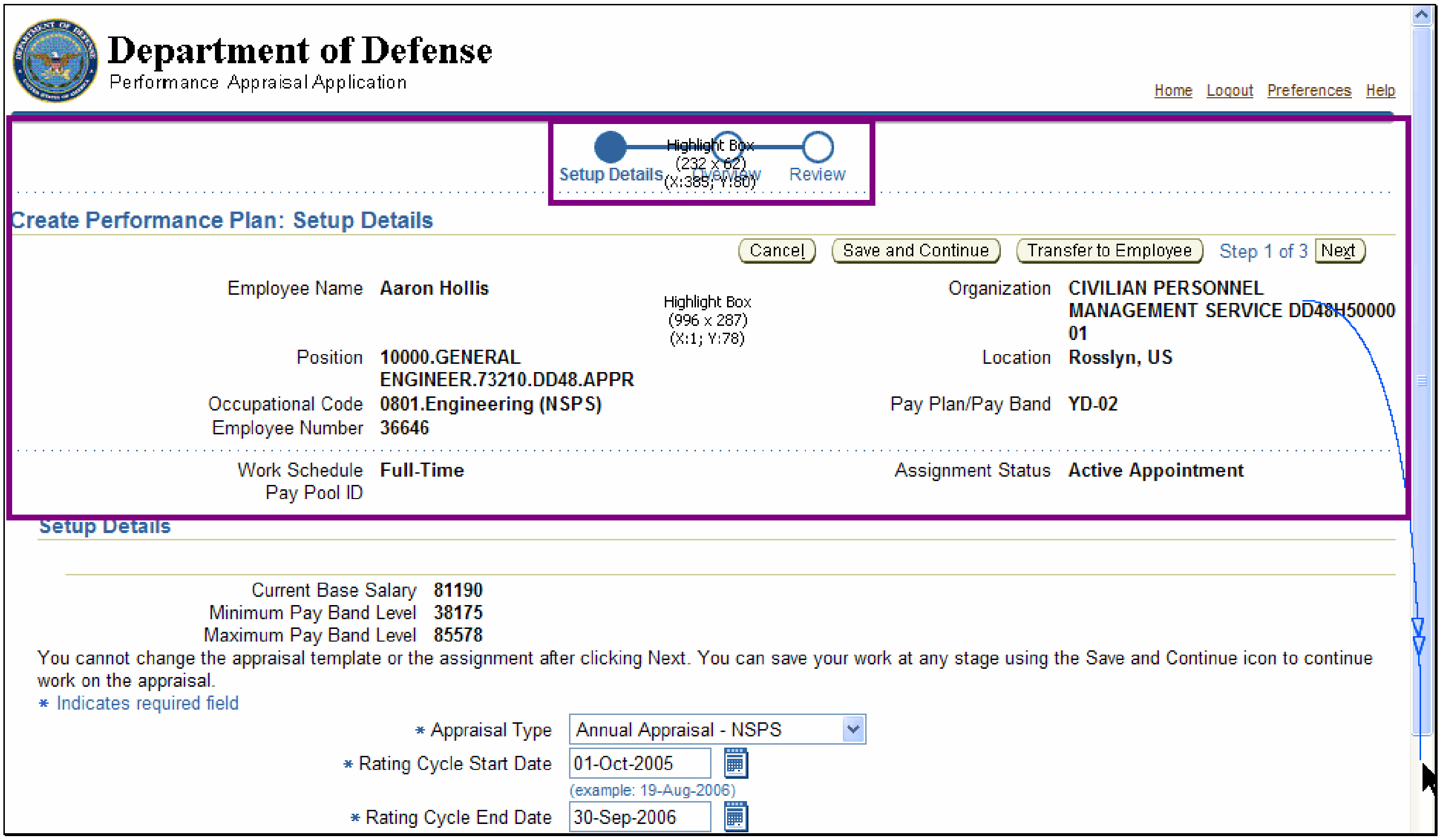



**Text Captions**

On this page, the rating hierarchy is displayed. As the rating official, Luke's name is listed at the top. Below his name are the employees he is responsible for rating.

Selecting the Branch node icon displays a specific branch or level in the organizational hierarchy for an employee.

Luke will establish a plan for Aaron Hollis by selecting the **Action** icon.




**Text Captions**

The first thing you may notice on the Create Performance Plan - Set Up Details page is that a navigation bar is introduced at the top of the screen.

The navigation bar indicates where you are in the process. The process differs for rating officials and employees. For rating officials, it includes three steps: Setup Details, Overview, and Review.

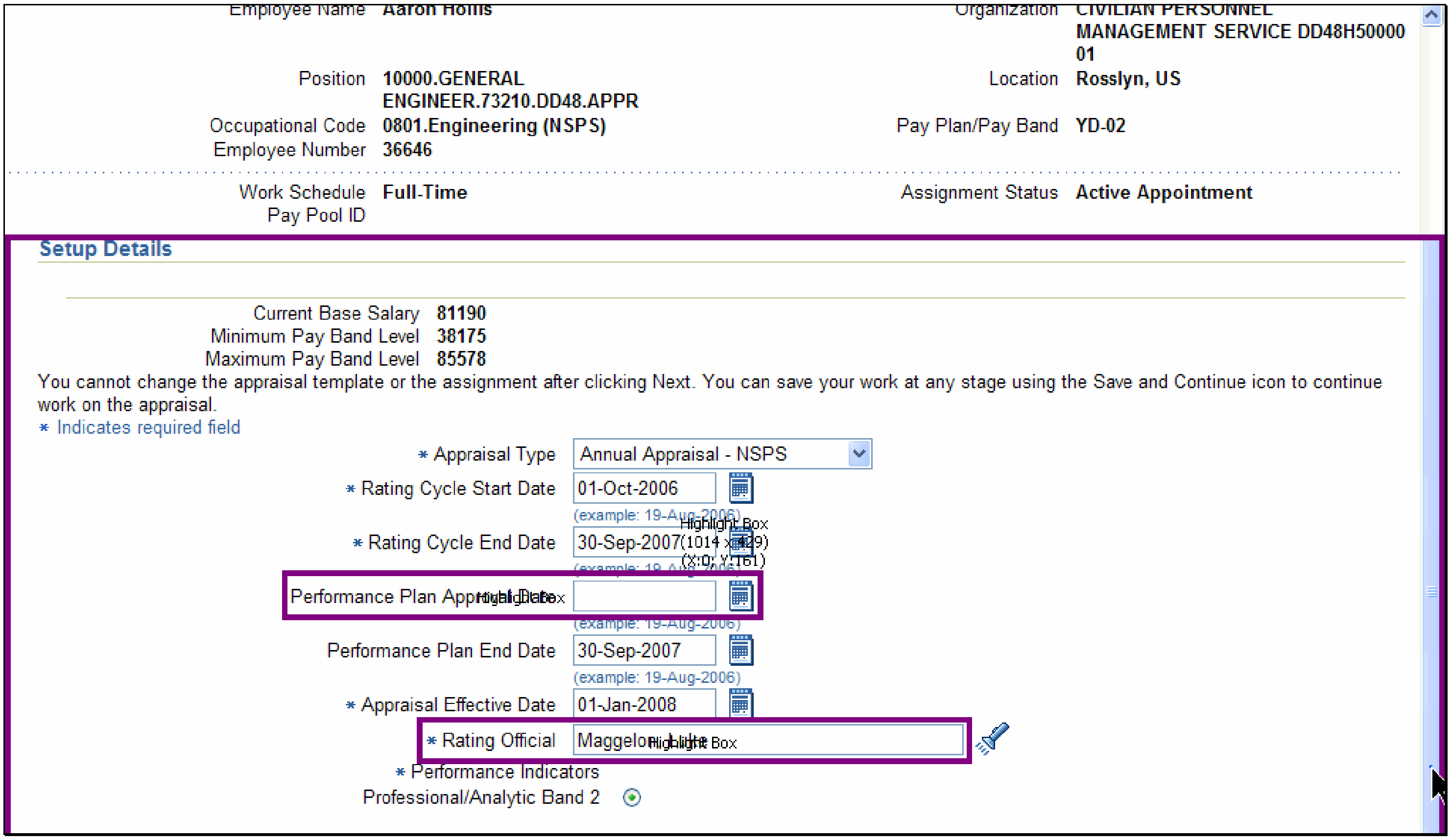
Rating officials are responsible for completing these steps when creating performance plans.

During step 1, Setup Details, the appraisal type, dates, and rating official are established. During step 2, Overview, information may be updated. During step 3, Review, information that was updated and saved is reviewed.

Note: you should make it a habit to use the Review screen to verify that all information is correct for a given employee.

The Set-up Details page provides the information you need as a rating official to develop an effective performance plan. The page is divided into two sections:

The top section provides details about the employee, including his or her occupation, pay schedule, and pay band.



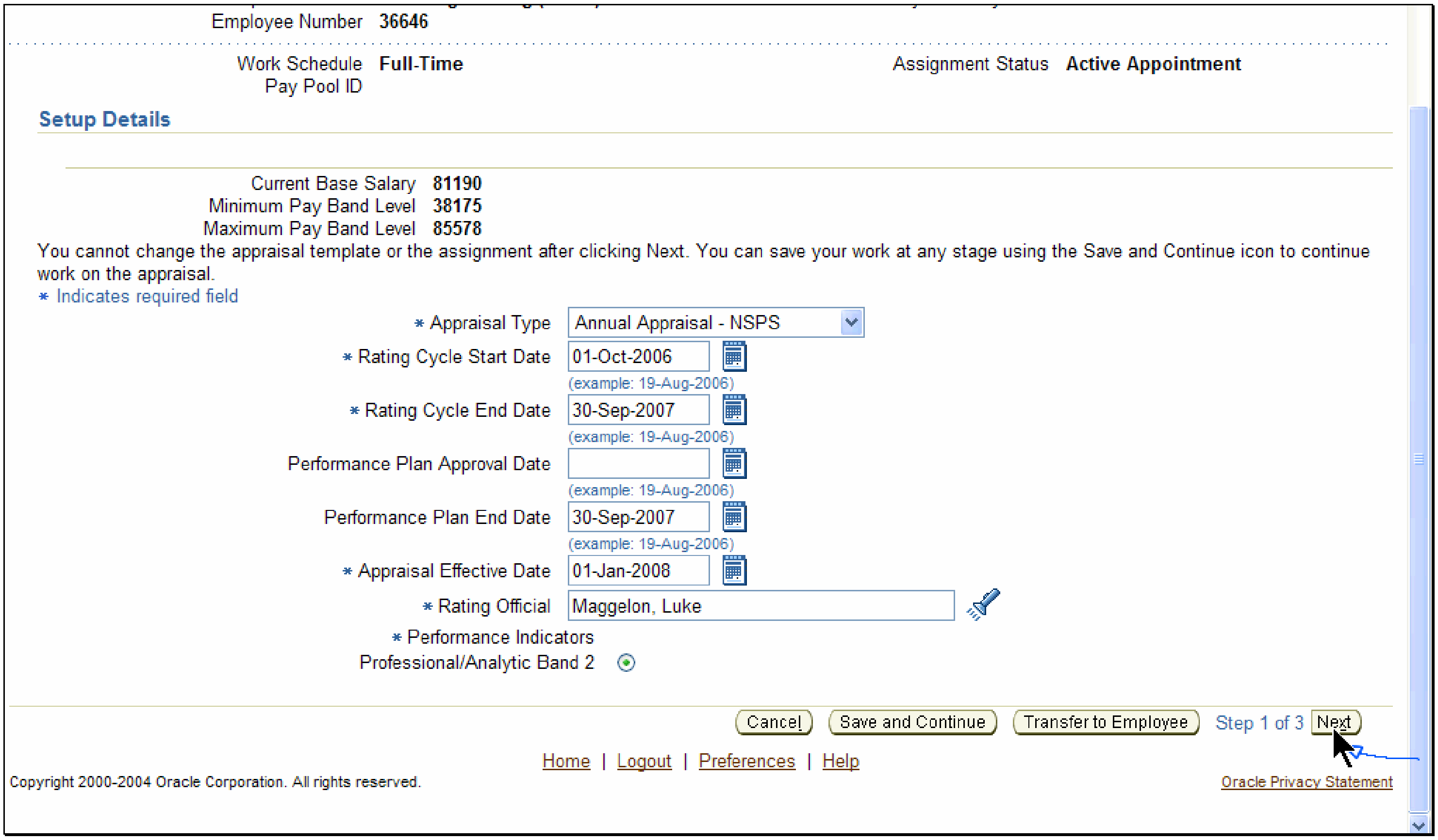

**Text Captions**

The second section provides information about the appraisal cycle.

The system is designed so that the dates auto-populate for the appraisal period. If necessary, you can manually change them.

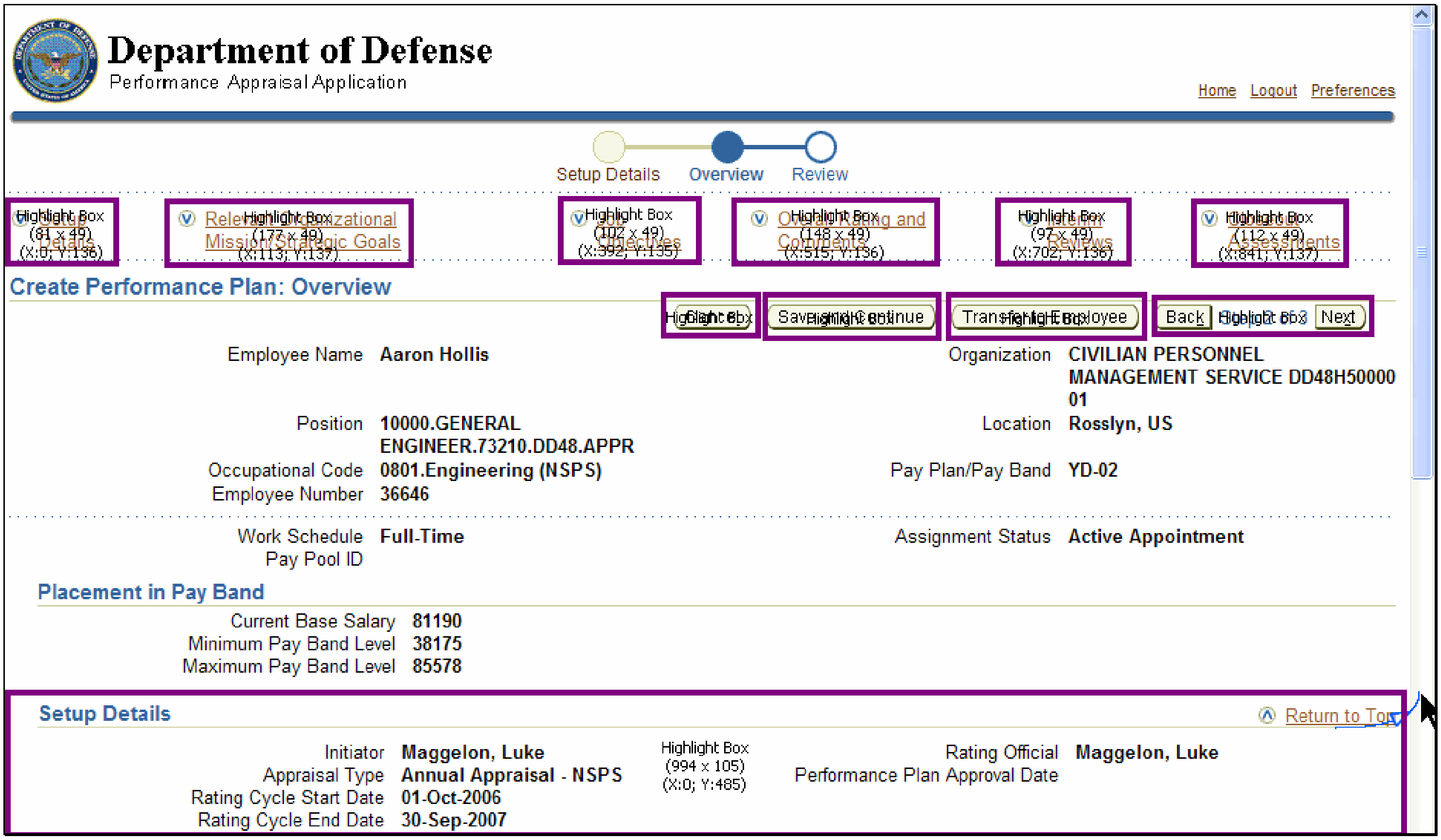
The Performance Plan Approval Date field remains blank until the plan receives a second-level review and is approved.

The rating official field is also auto-populated, but can be manually changed.




**Text Captions**

When the information has been completed, select **Next** to advance to step 2 – the Overview page.




**Text Captions**

Take a look at the top of the page. Notice that there are links to the following:

**Set up Details** – By selecting this link you go back to step 1.

**Relevant Organizational Mission/Strategic Goals** - By selecting this link you can enter your organization's mission and strategic goals for the appraisal period.

Job objectives must align with organizational goals, so it is helpful to complete this section first. If you are unfamiliar with your organization's goals for the performance cycle, you are encouraged to speak with your supervisor.

**Job Objectives** - By selecting this link you can enter the draft job objectives. Remember, typically employees have between three and five objectives.

As a best practice, rating officials should share draft job objectives with employees so that there is a mutual understanding of what is expected of them during the appraisal period.

**Overall Rating and Comments** - By selecting this link, you can document the end-of-cycle rating and record your feedback.

**Interim Reviews** - By selecting this link, you can document an interim review. Remember, at least one interim review is required.

**Closeout Assessments** - By selecting this link, you can document a closeout assessment for an employee who will no longer be evaluated by you at the end of the appraisal cycle.

Next, five buttons appear on the top and bottom of each page that allow you to do the following:

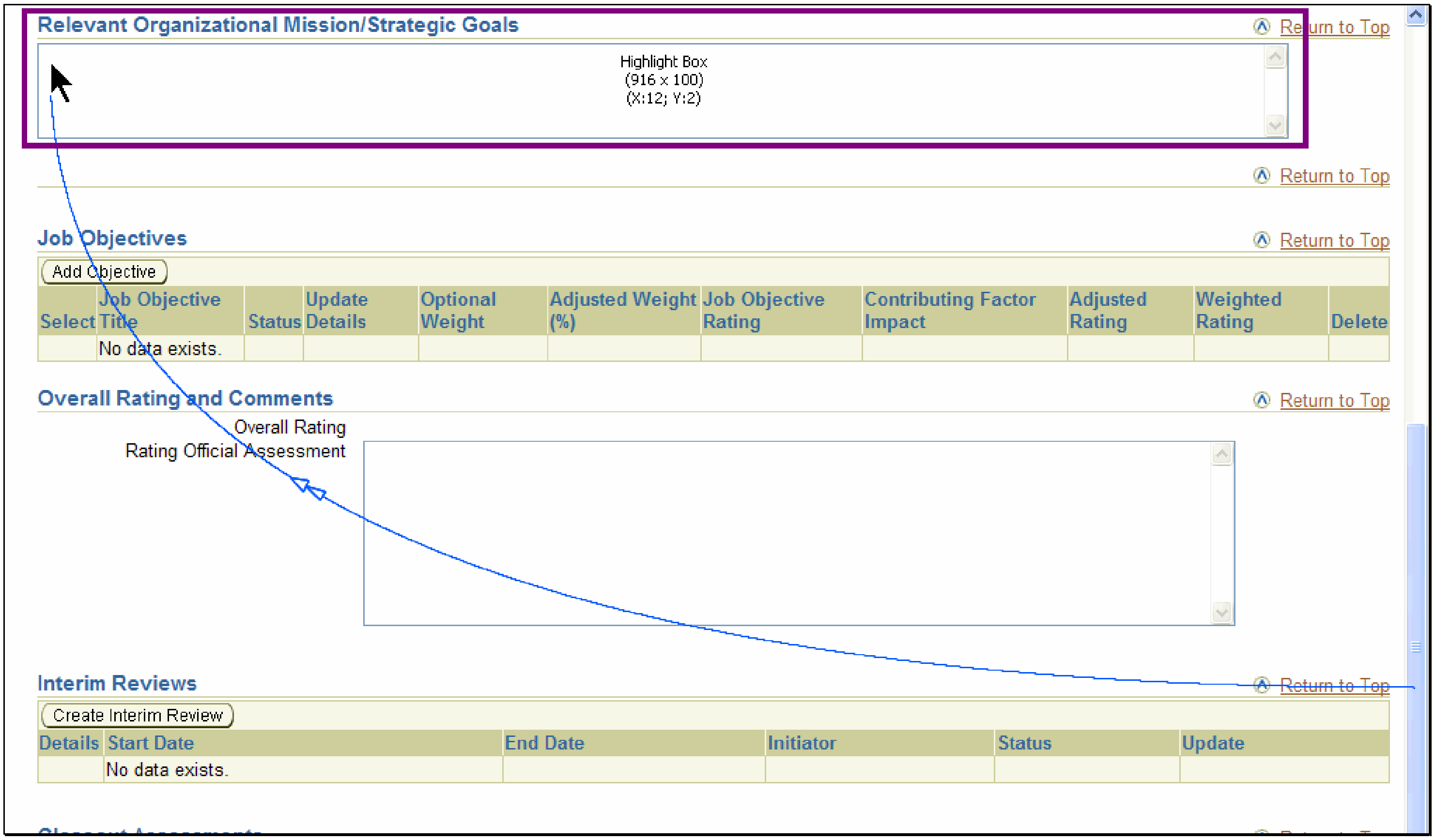
**Cancel:** Selecting this button cancels all changes and returns you to the main page.

**Save and Continue:** Selecting this button saves your changes and allows you to proceed on the same page.

**Transfer to Employee**: Selecting this button notifies your employee that the performance plan is ready for review and comment.

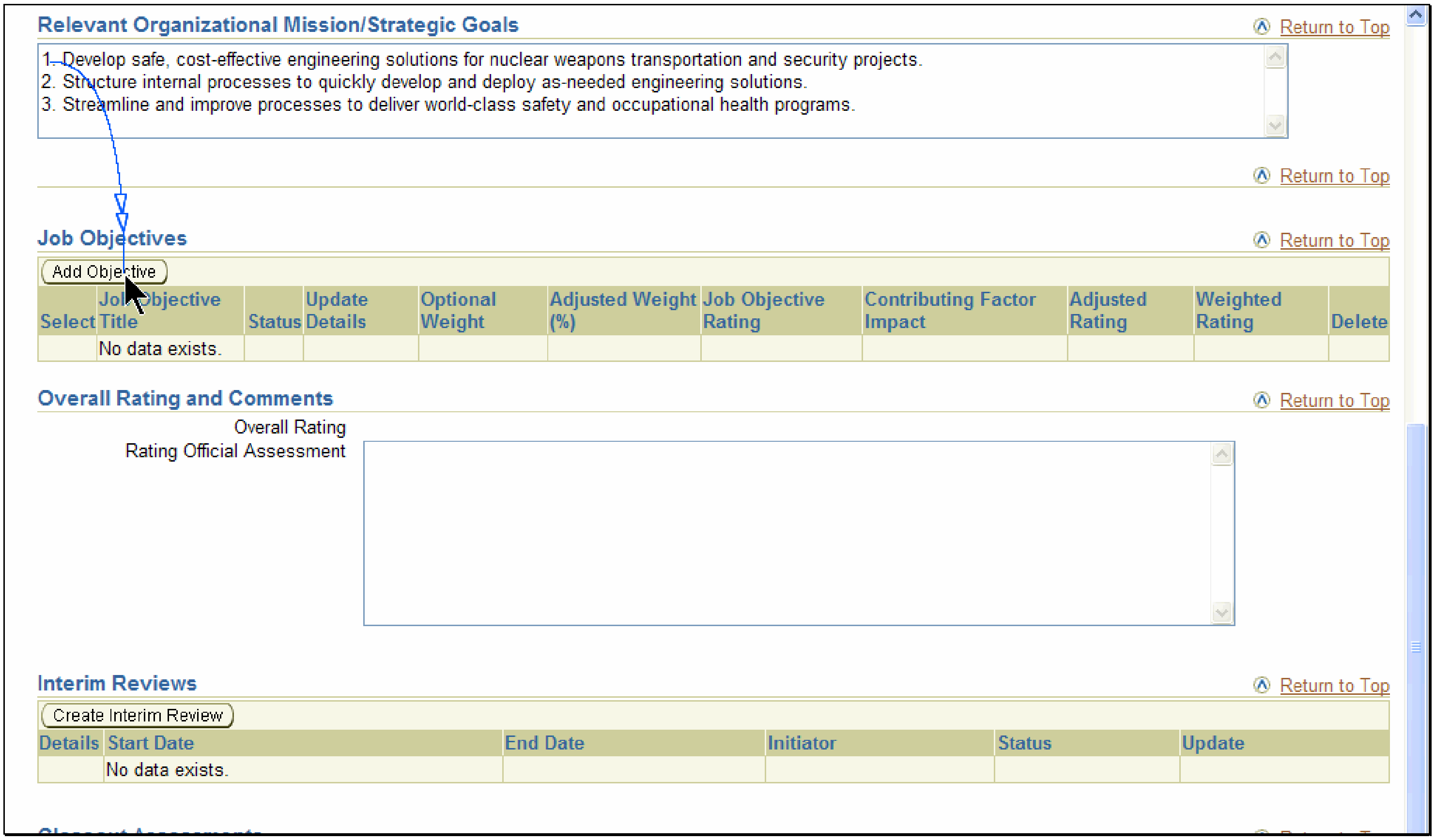
**Back** and **Next:** Selecting these buttons brings you to the previous or next step.

Now let's take a look at the next section of the page. The information in this section carries over information from step 1, Setup Details.




**Text Captions**

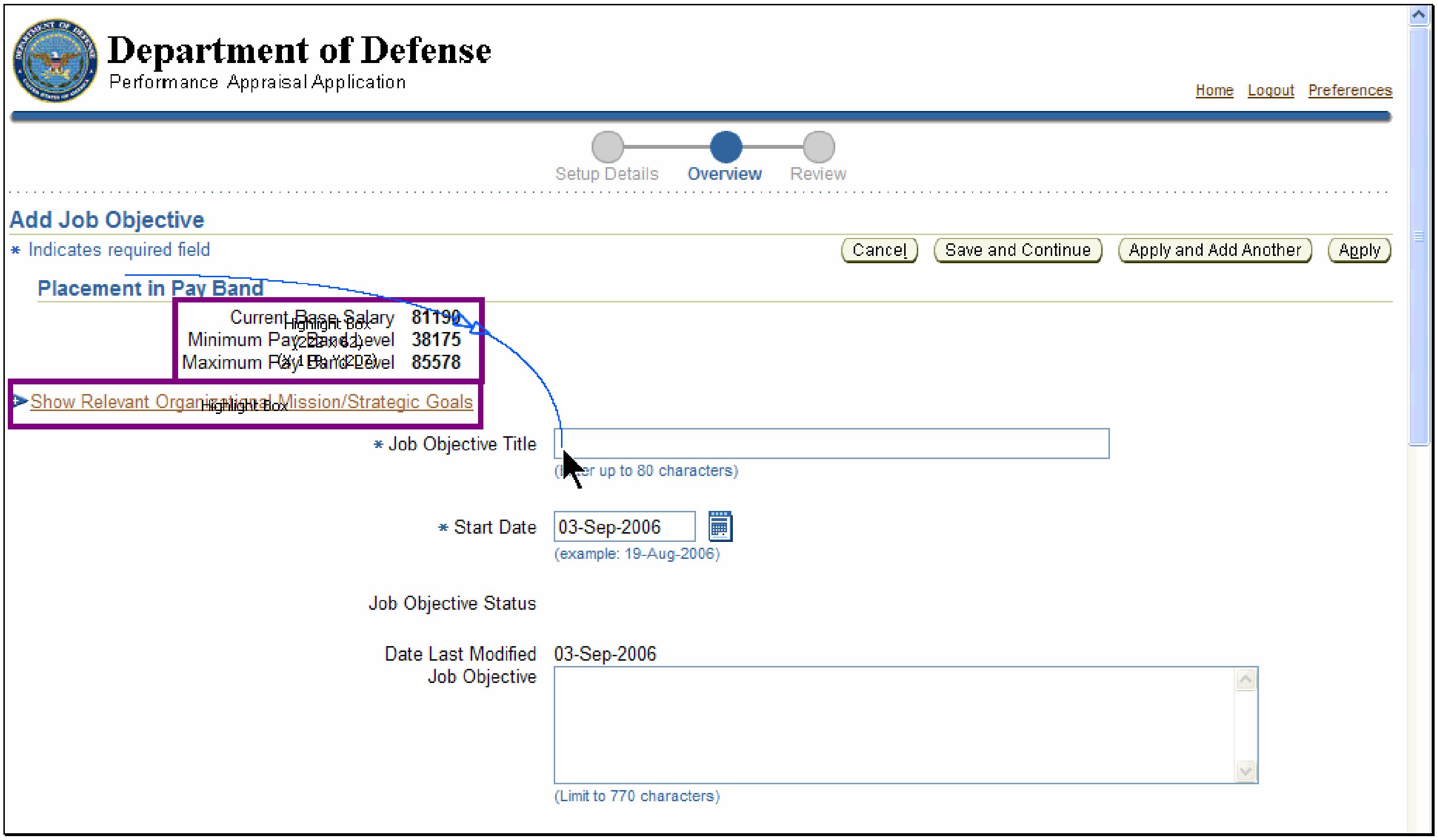
In this section of the page you enter your organizational mission and strategic goals. You may enter information in two ways: You may manually type the information; or you may “cut and paste” information from another document.




**Text Captions**

Next you enter the employee's job objectives by selecting **Add Objective**. After an objective has been developed, the summary fields will be auto-populated so that you have a quick status update of each objective.

Now let's watch Luke add a job objective for Aaron.  He starts by selecting **Add Objective**.

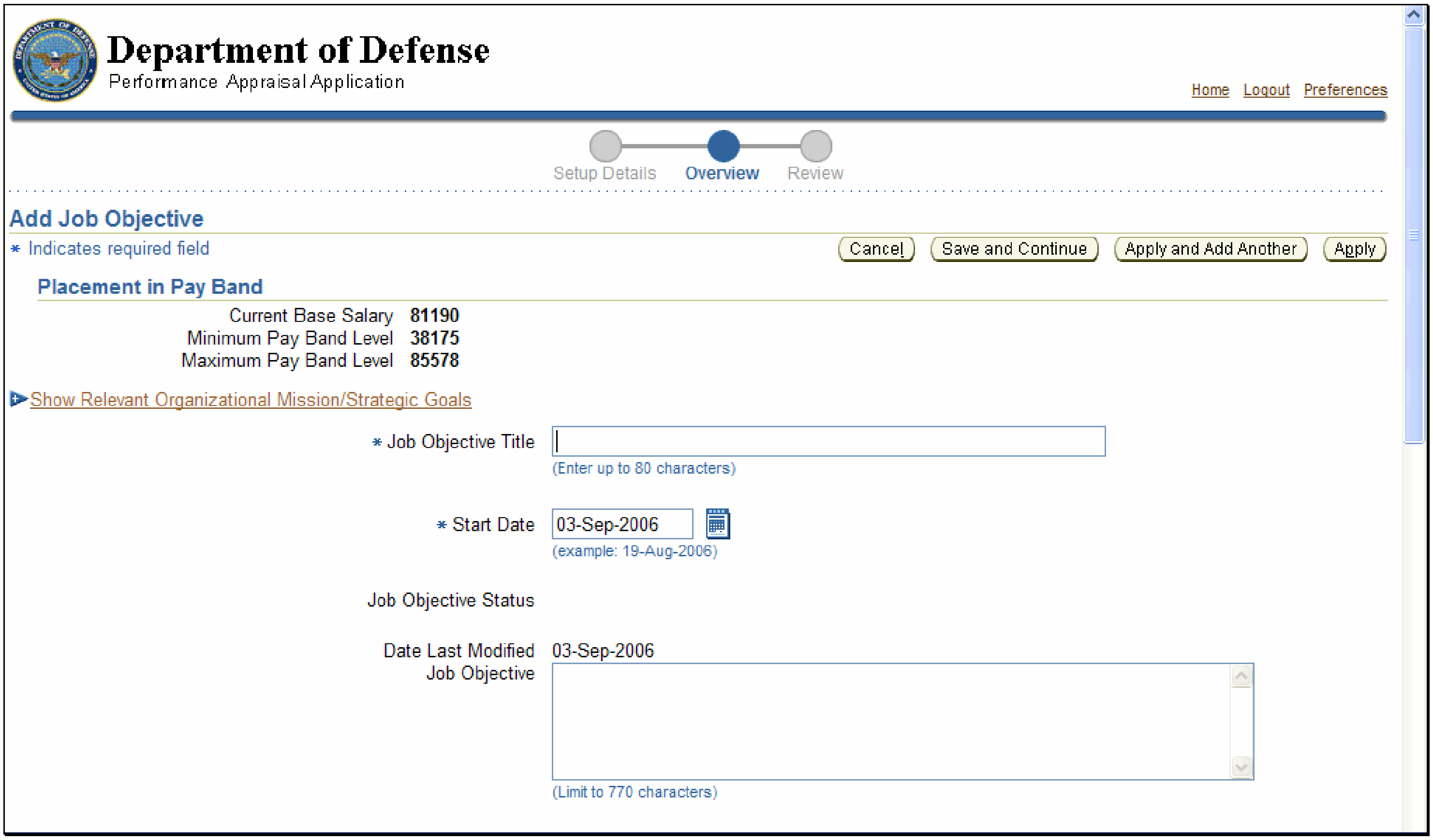



**Text Captions**

Notice a few important pieces of information:
First, the salary information is carried forward so that Luke can consider this when establishing job objectives.

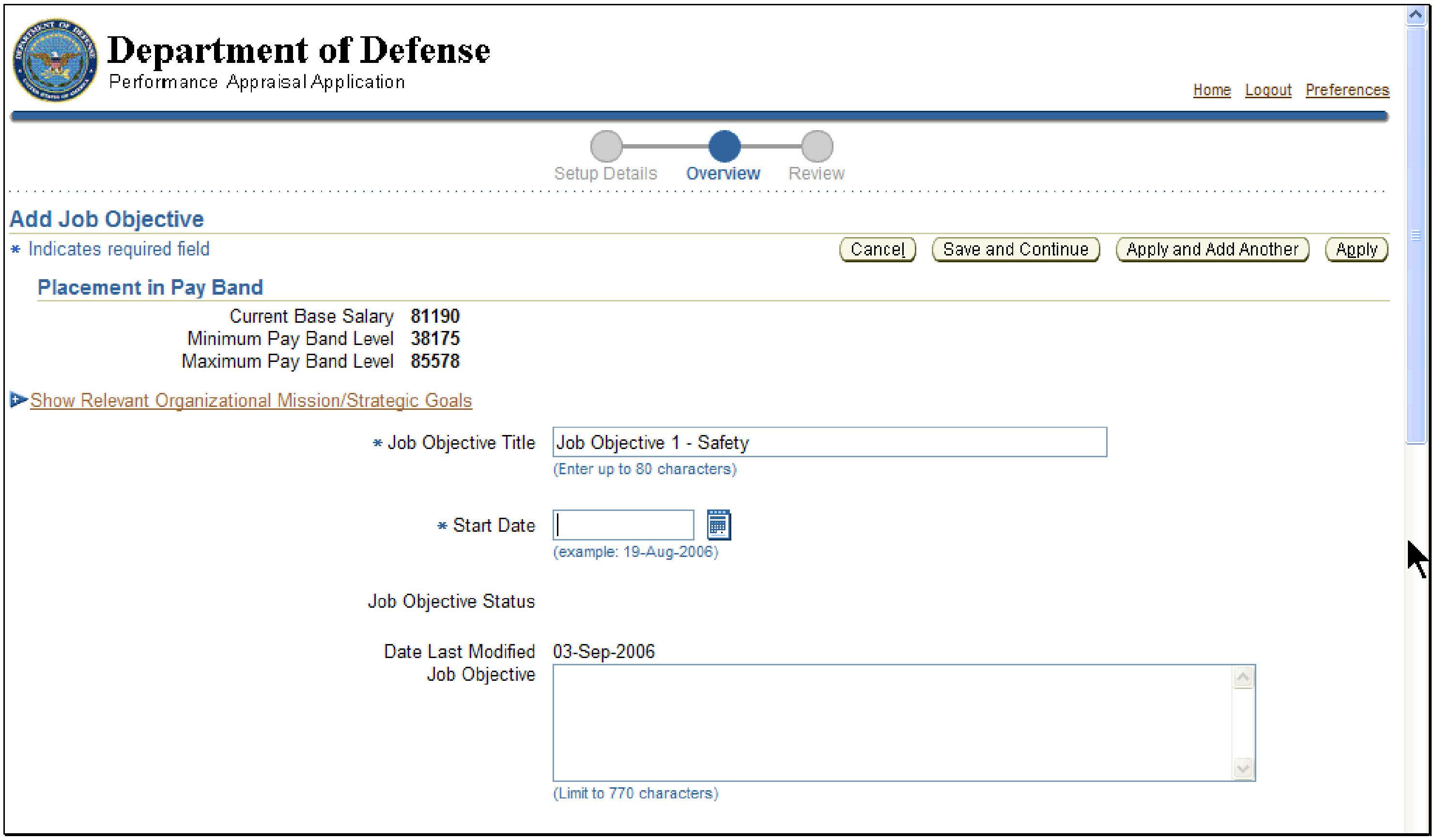
Second, a link to the organization mission and strategic goals is provided for quick reference.

To add an objective, Luke first creates a job objective title. These typically include numbers so that they sort numerically in lists.



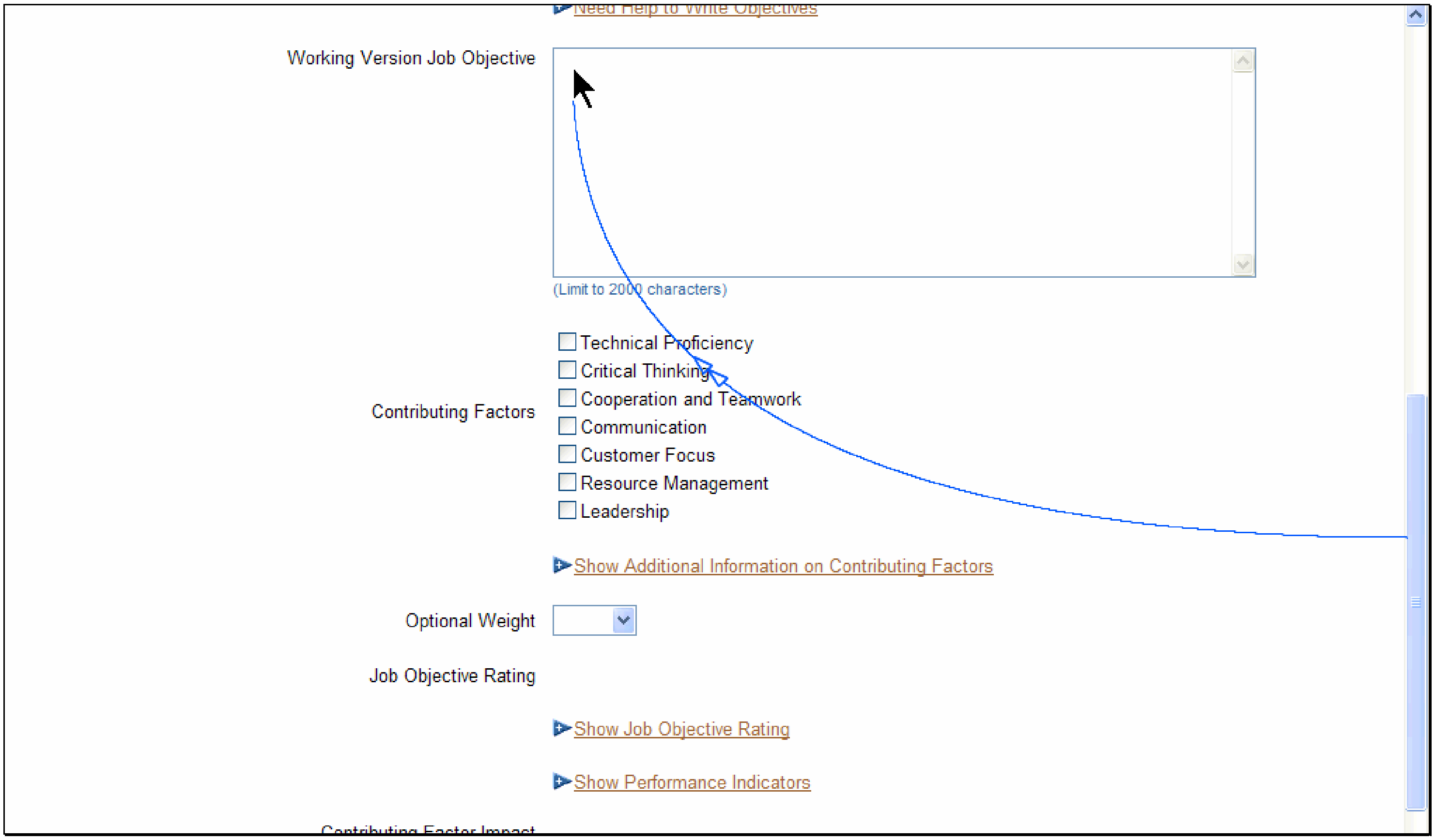

**Text Captions**

To add an objective, Luke first creates a job objective title. These typically include numbers so that they sort numerically in lists.




**Text Captions**

Then he enters the start date. Remember that the period of performance must be within the appraisal period.



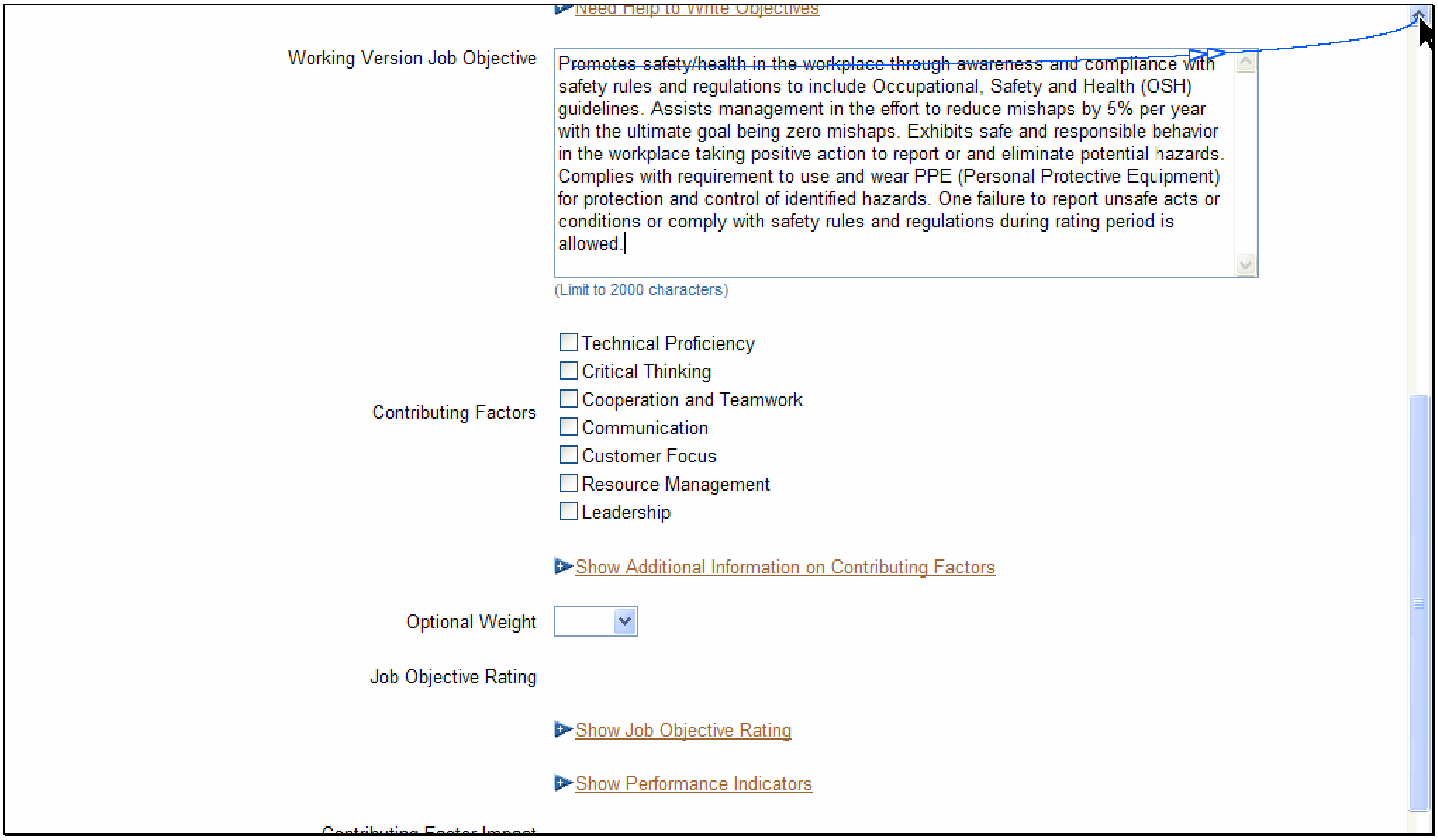

**Text Captions**

Next Luke enters the job objective. This is the section where the final job objective is documented.

Rating officials and employees are encouraged to use the Working Version Job Objective text box to develop job objectives and exchange input and feedback.

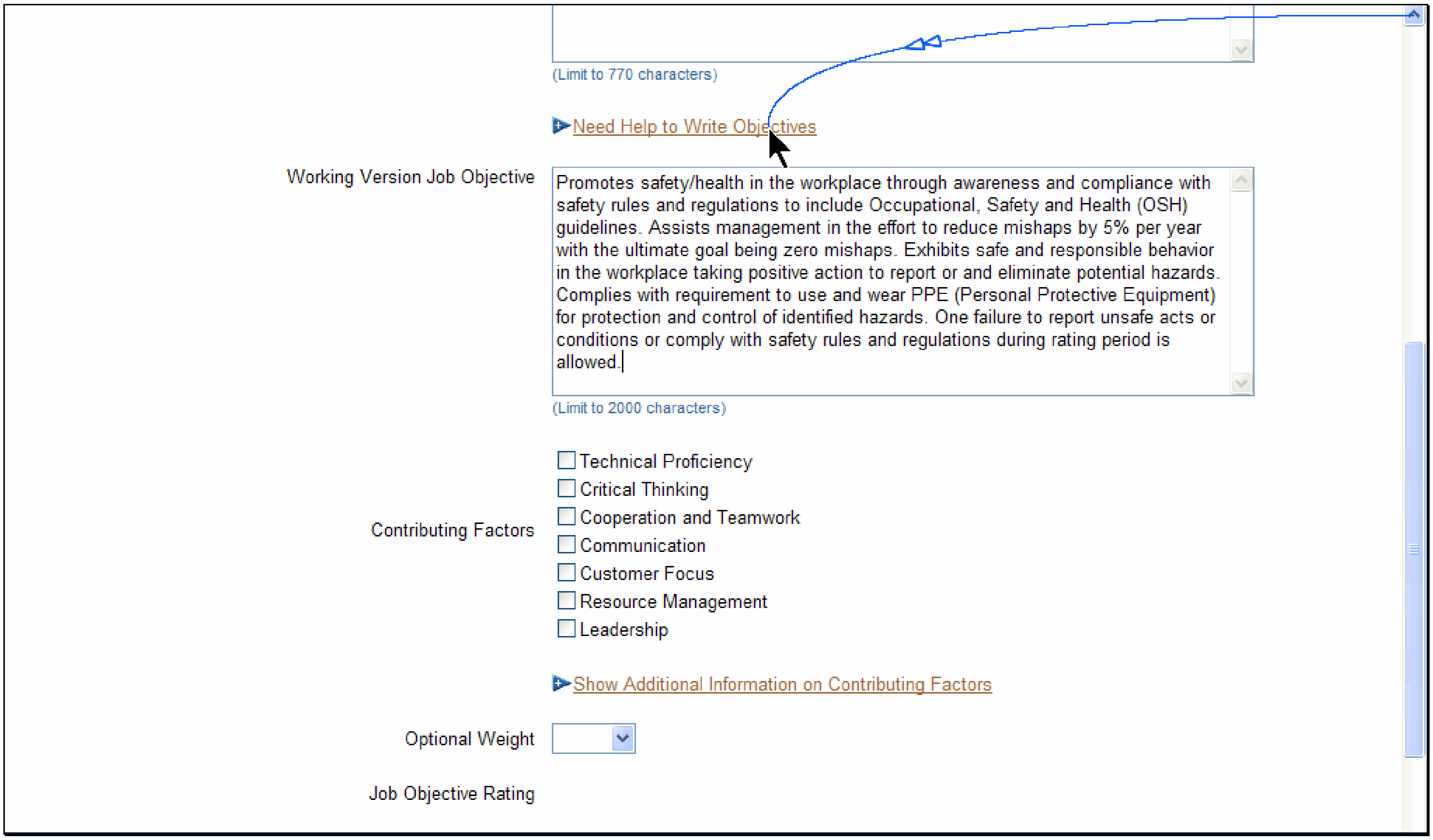
After this process has been completed, either Luke or Aaron cuts and pastes the language into the Job Objective text box.

Note that after the job objective has been approved, the information in the Working Version Job Objective text box is purged. And remember, supervisors are required to have at least one “supervisory” job objective.



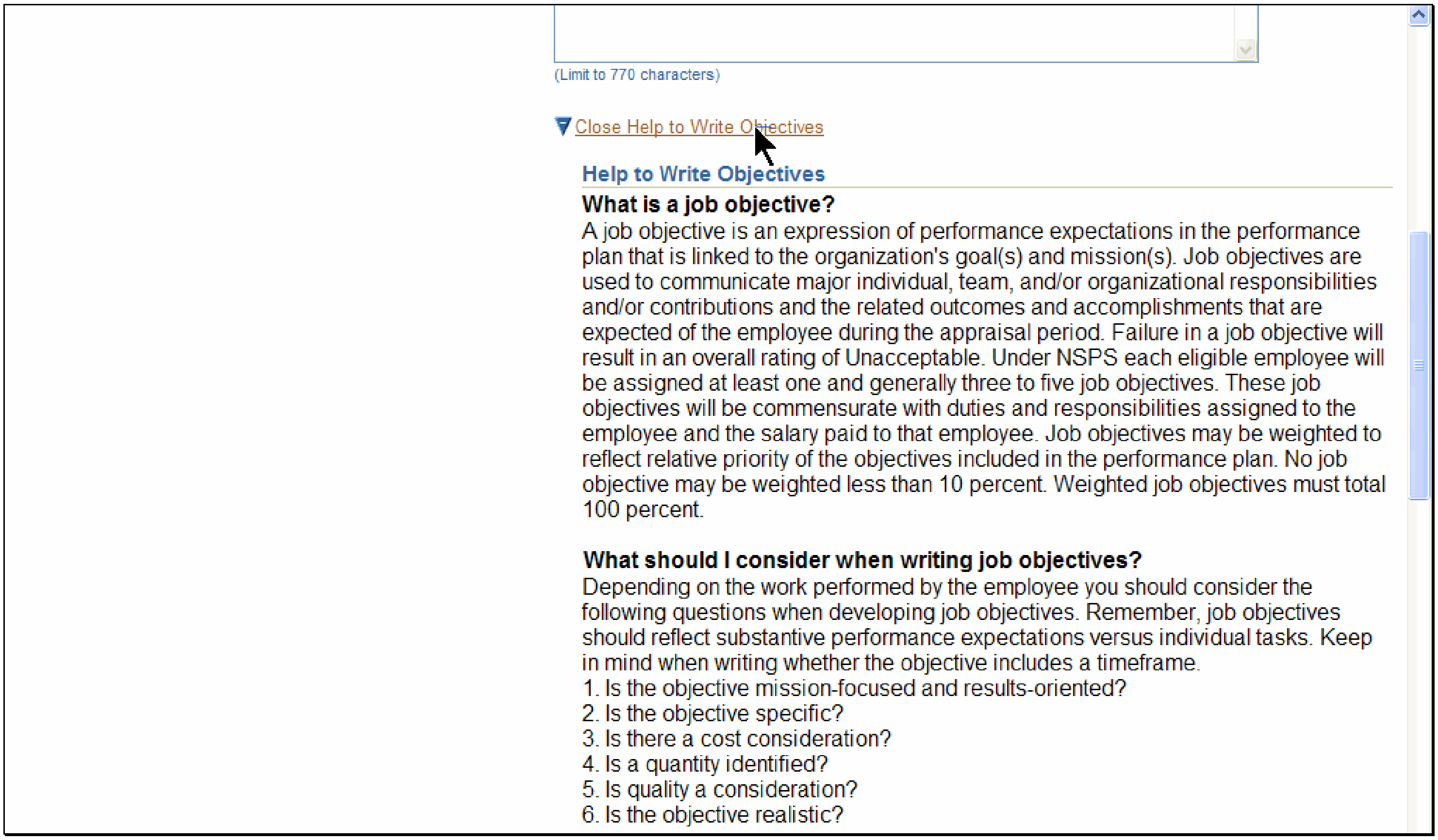

**Text Captions**

Note that after the job objective has been approved, the information in the Working Version Job Objective text box is purged. And remember, Supervisors are required to have at least one “supervisory” job objective.



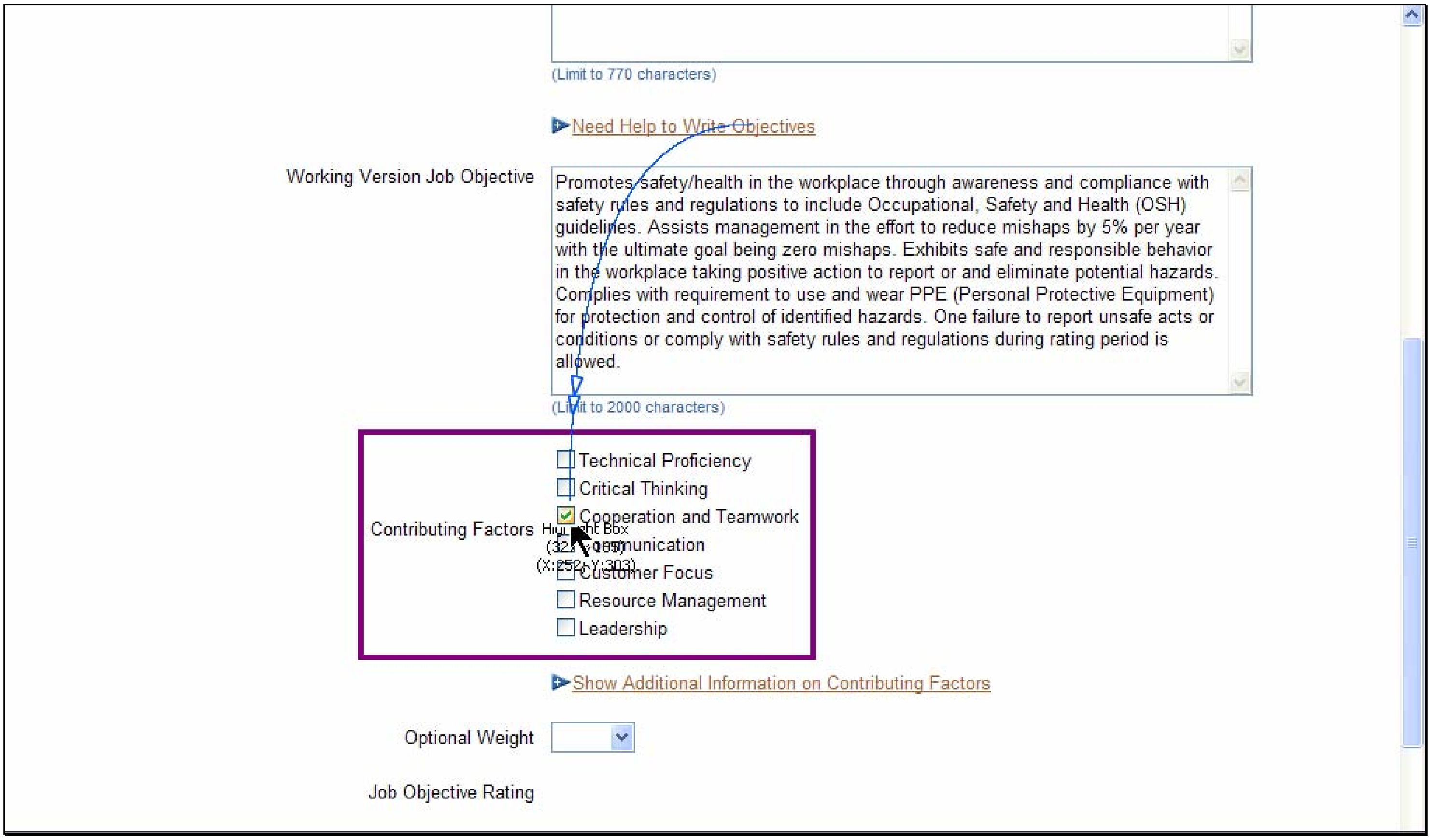

**Text Captions**

Luke wants assistance to develop the job objective, so he selects **Need Help to Write Objectives**. He is directed to a series of questions that help him frame an effective job objective.




**Text Captions**

When your are done with the help, select **Close Help to Write Objectives** and you are returned to the job objective section.



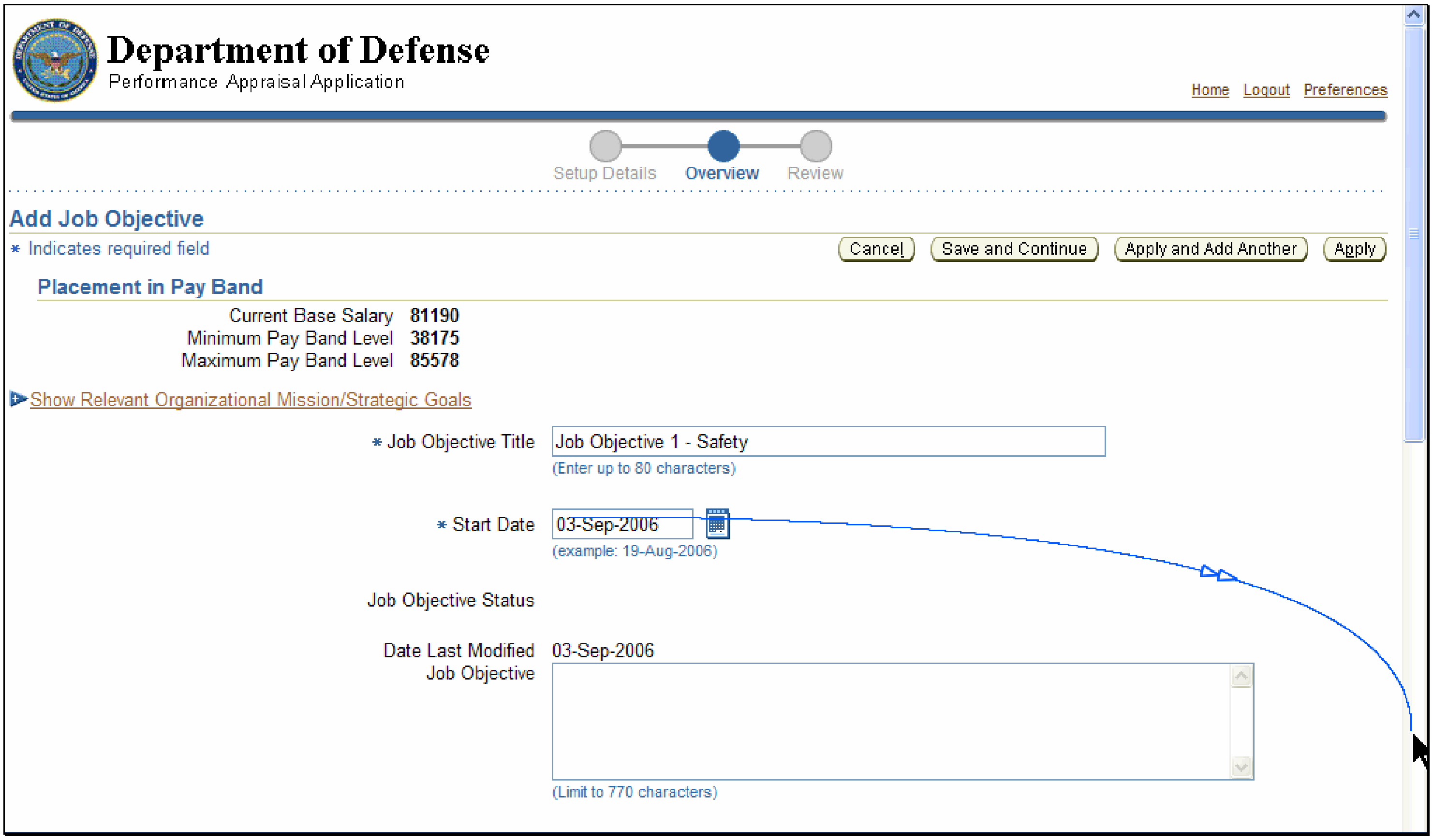

**Text Captions**

Next, Luke determines the influence of Contributing Factors.  This is the section used to select the appropriate contributing factors for a particular job objective.

Typically one to three contributing factors are selected for each job objective. The contributing factor(s) must be relevant to the completion of the job objective. There are seven contributing factors.

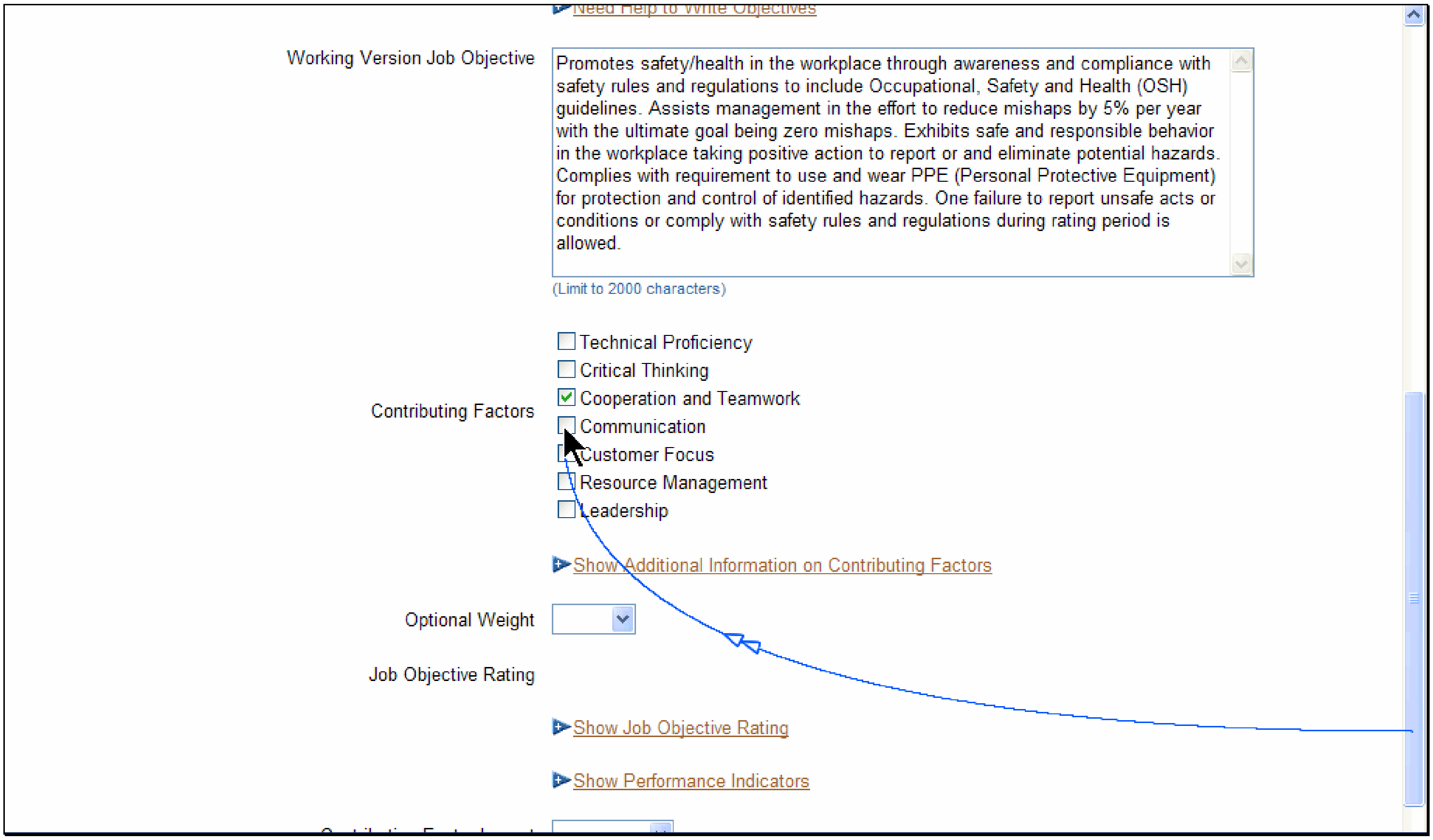
For this objective, Luke selects two contributing factors.

Cooperation and Teamwork is the first.



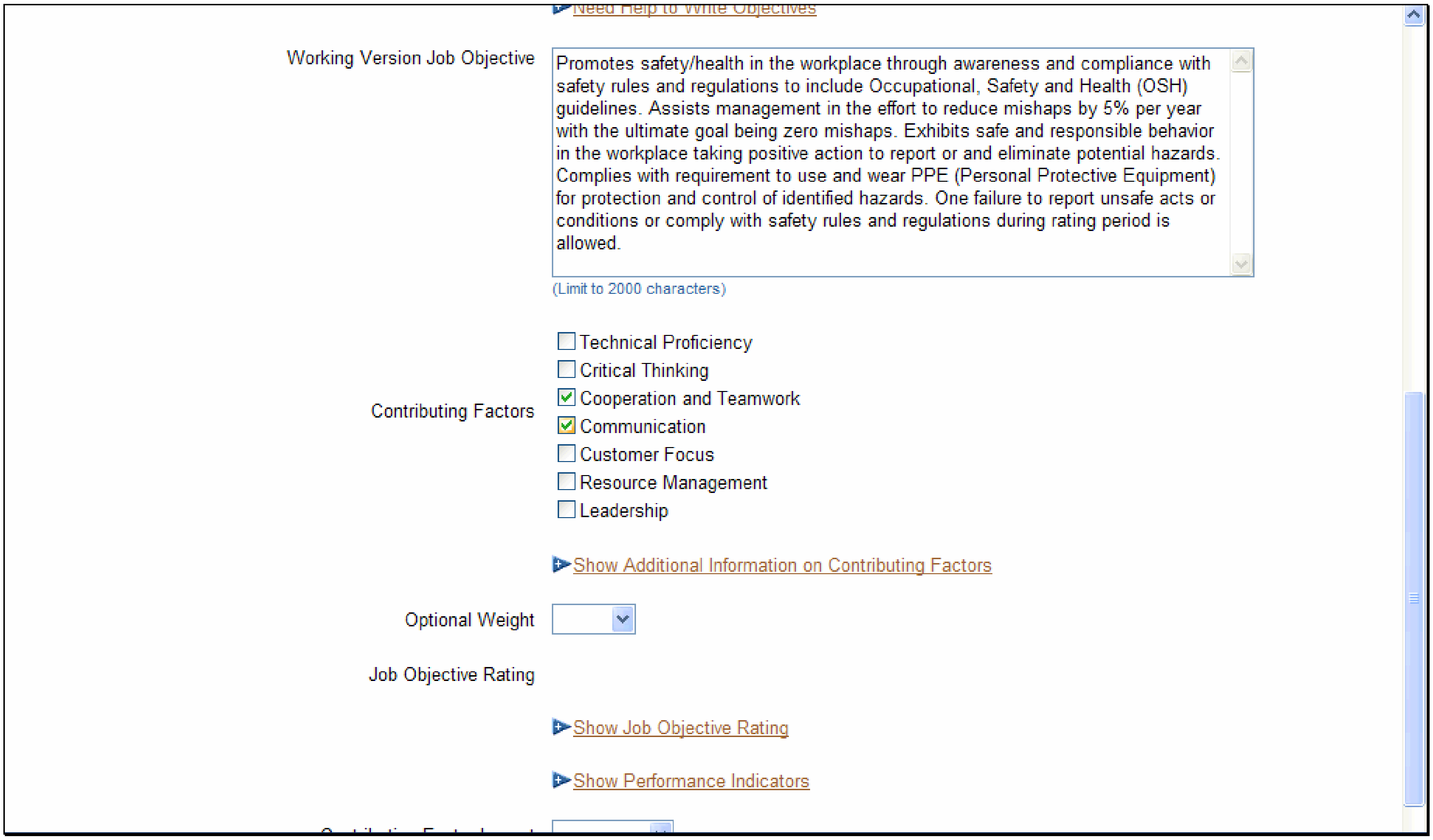

**Text Captions**

Note that the page scrolls to the top after you select each contributing factor, requiring you to scroll back down to select the next one.



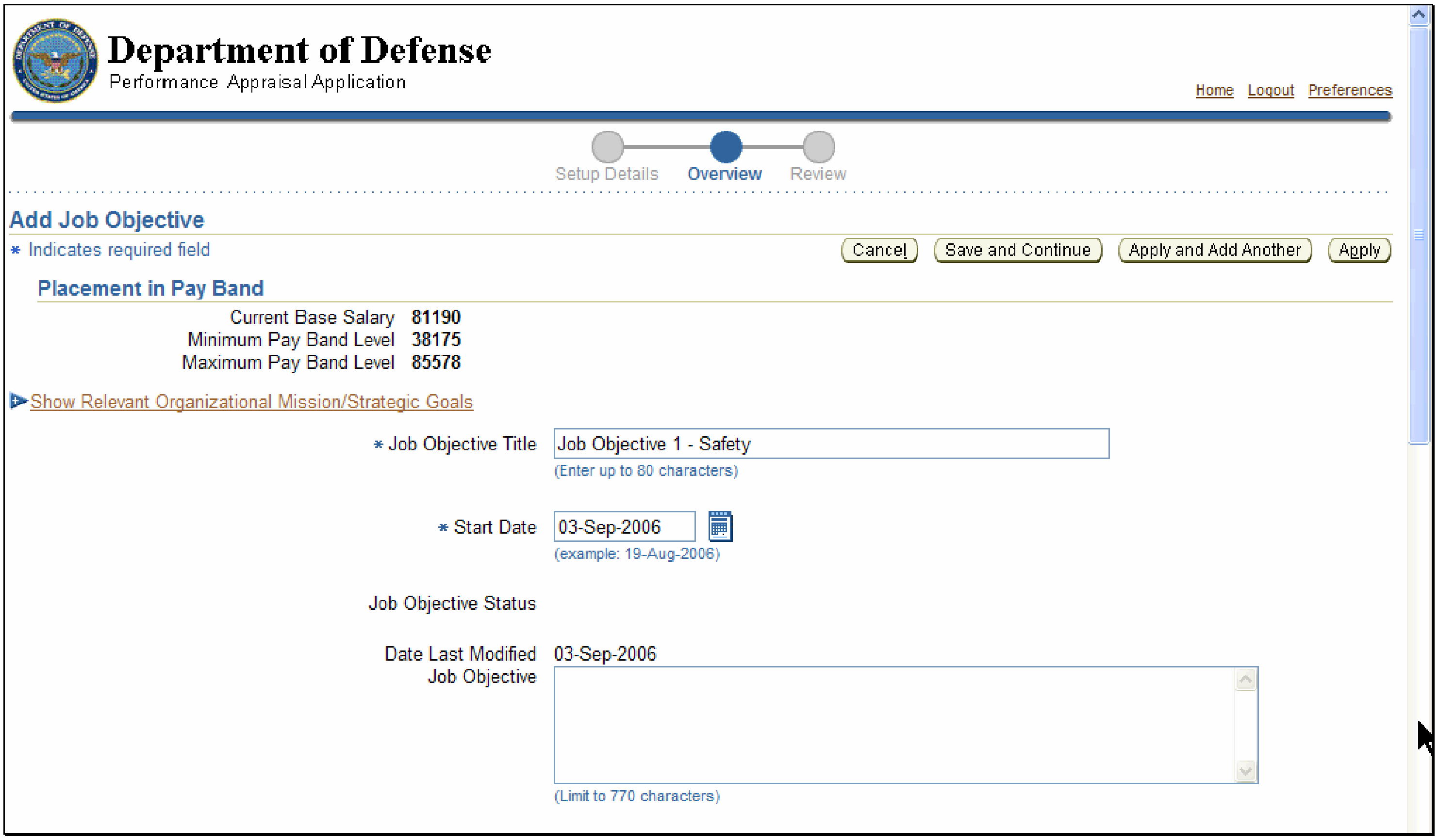

**Text Captions**

Communication.



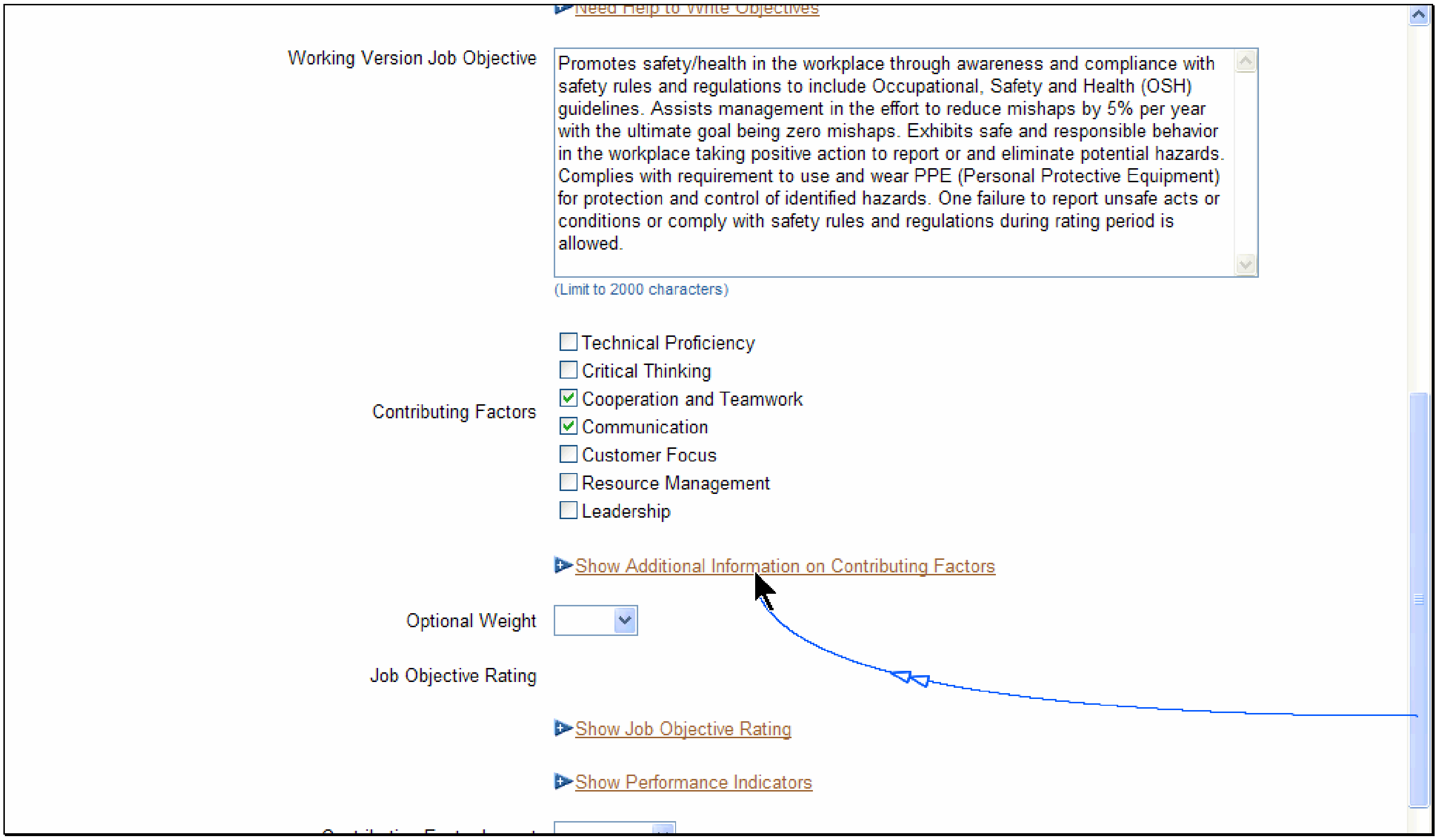

**Text Captions**

Communication.



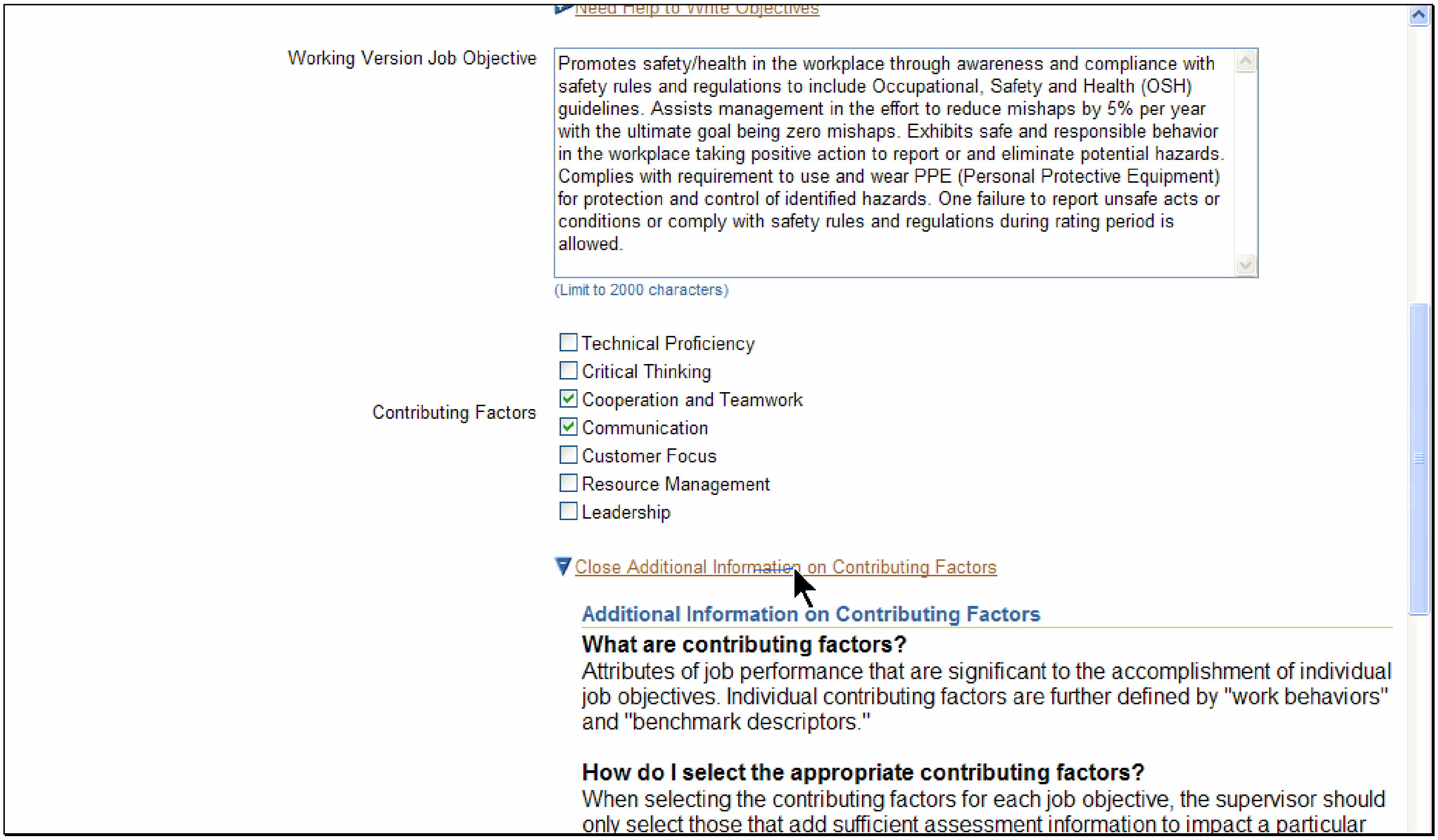

**Text Captions**

Communication.



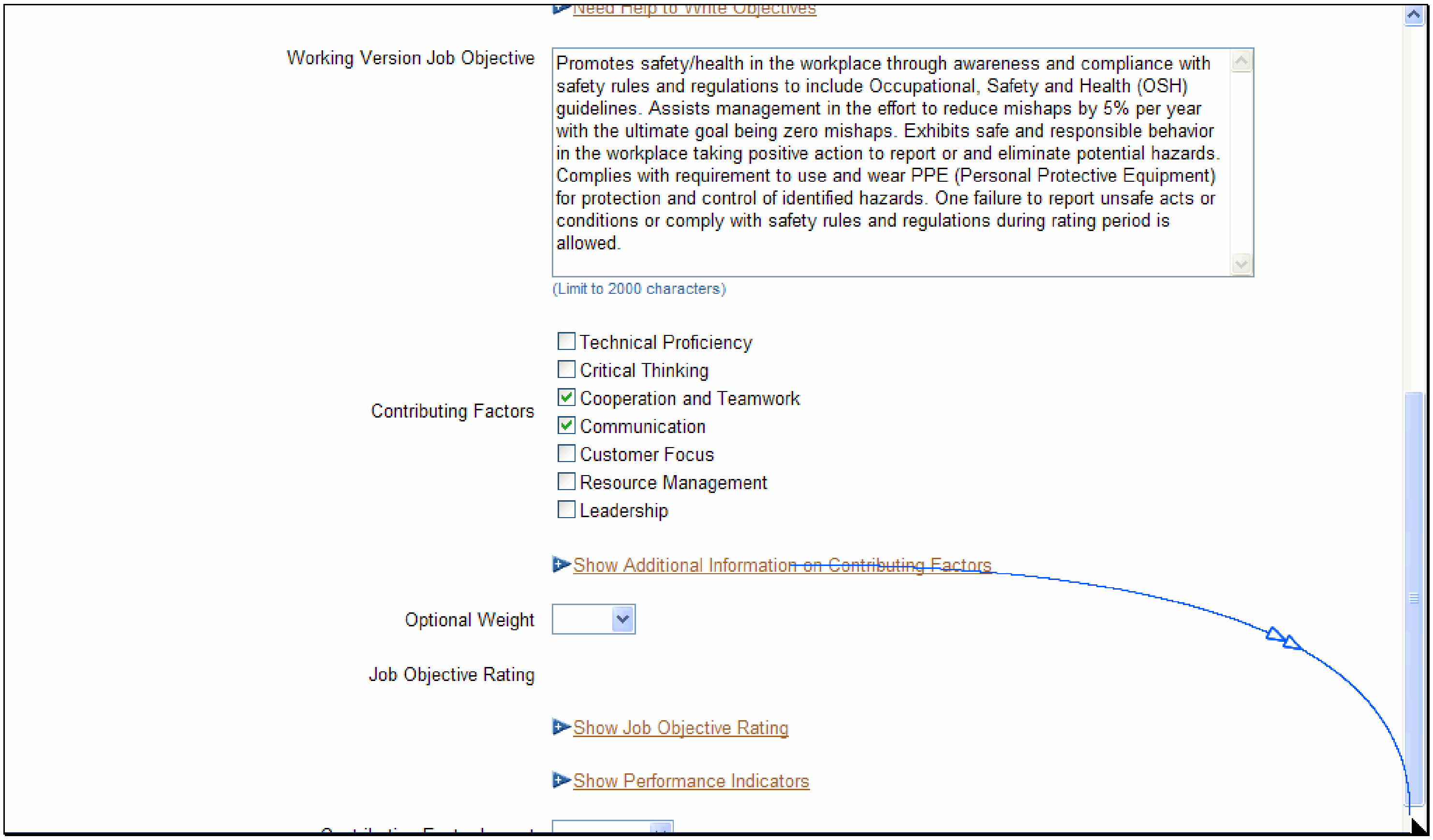

**Text Captions**

Luke wants additional assistance with determining whether a contributing factor is appropriate. He selects **Show Additional Information on Contributing Factors**. He is directed to a series of questions that help him choose contributing factors.



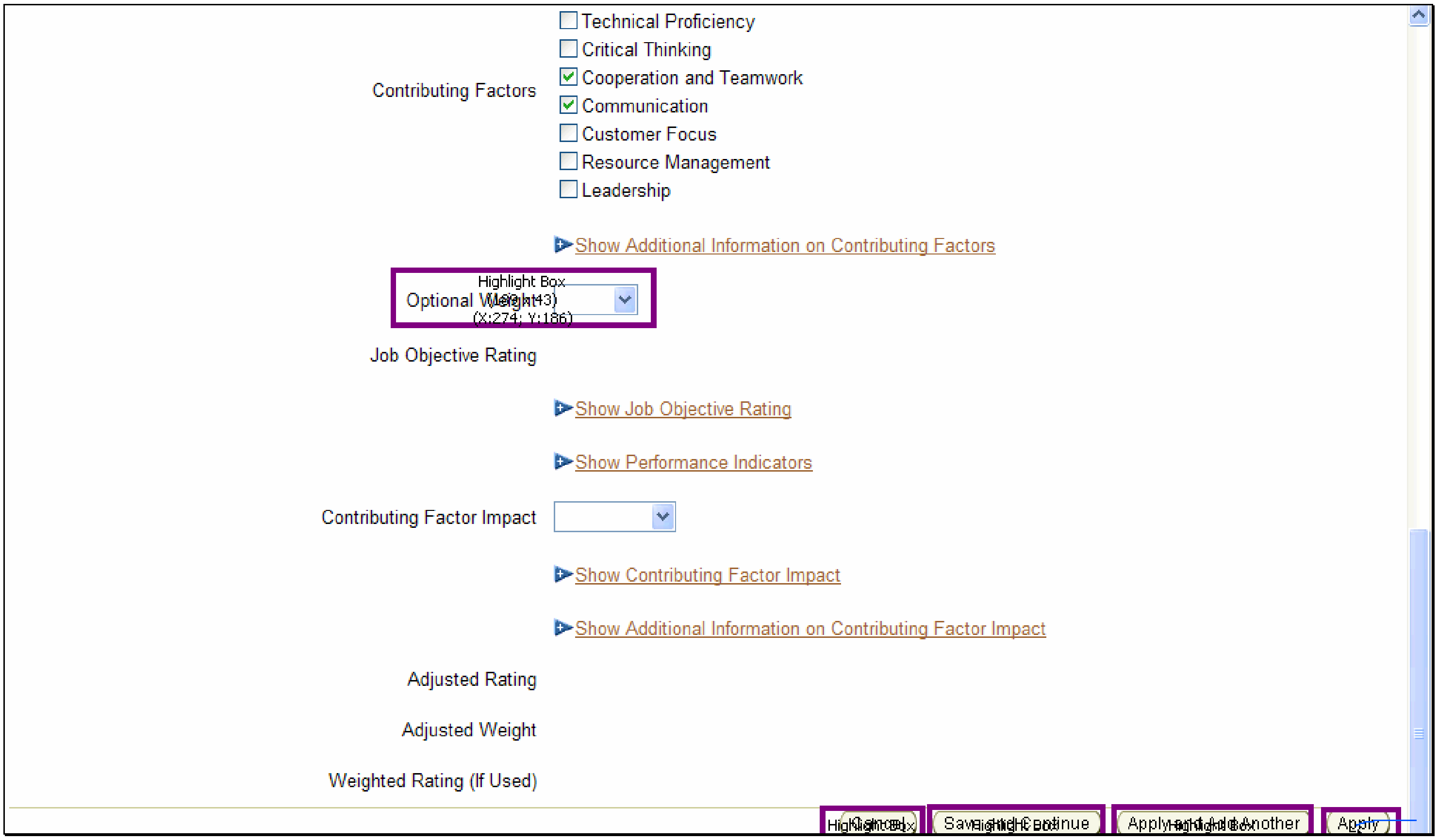

**Text Captions**

When done, he selects **Close Additional Information on Contributing Factors** to return to the contributing factor section. Remember, the Leadership contributing factor must be selected for a supervisory job objective.




**Text Captions**

When done, he selects **Close Additional Information on Contributing Factors** to return to the contributing factor section. Remember, the Leadership contributing factor must be selected for a supervisory job objective.




**Text Captions**

Determine the weight of a job objective – Weighting job objectives is optional and may only be identified by the rating official. If weighting is used, the total for all job objectives must equal 100 percent.

No job objective may be weighted less than 10 percent and weights must be made in increments of 5 percent. For the purpose of this demonstration, the job objective is not weighted.

Luke has completed entering the job objective and the associated contributing factors. At this stage he may do the following:

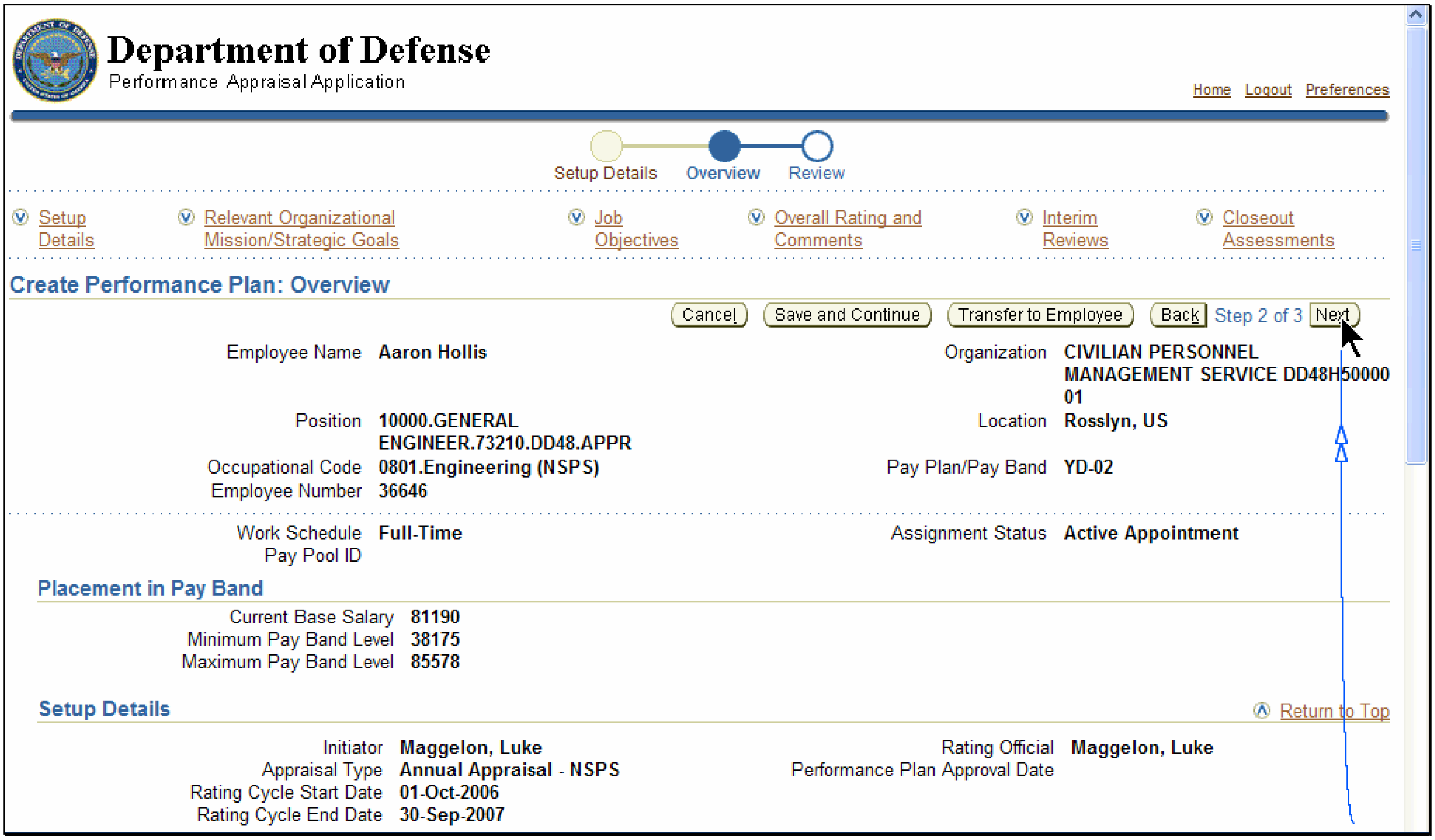
Cancel

Save and Continue

Apply and Add Another

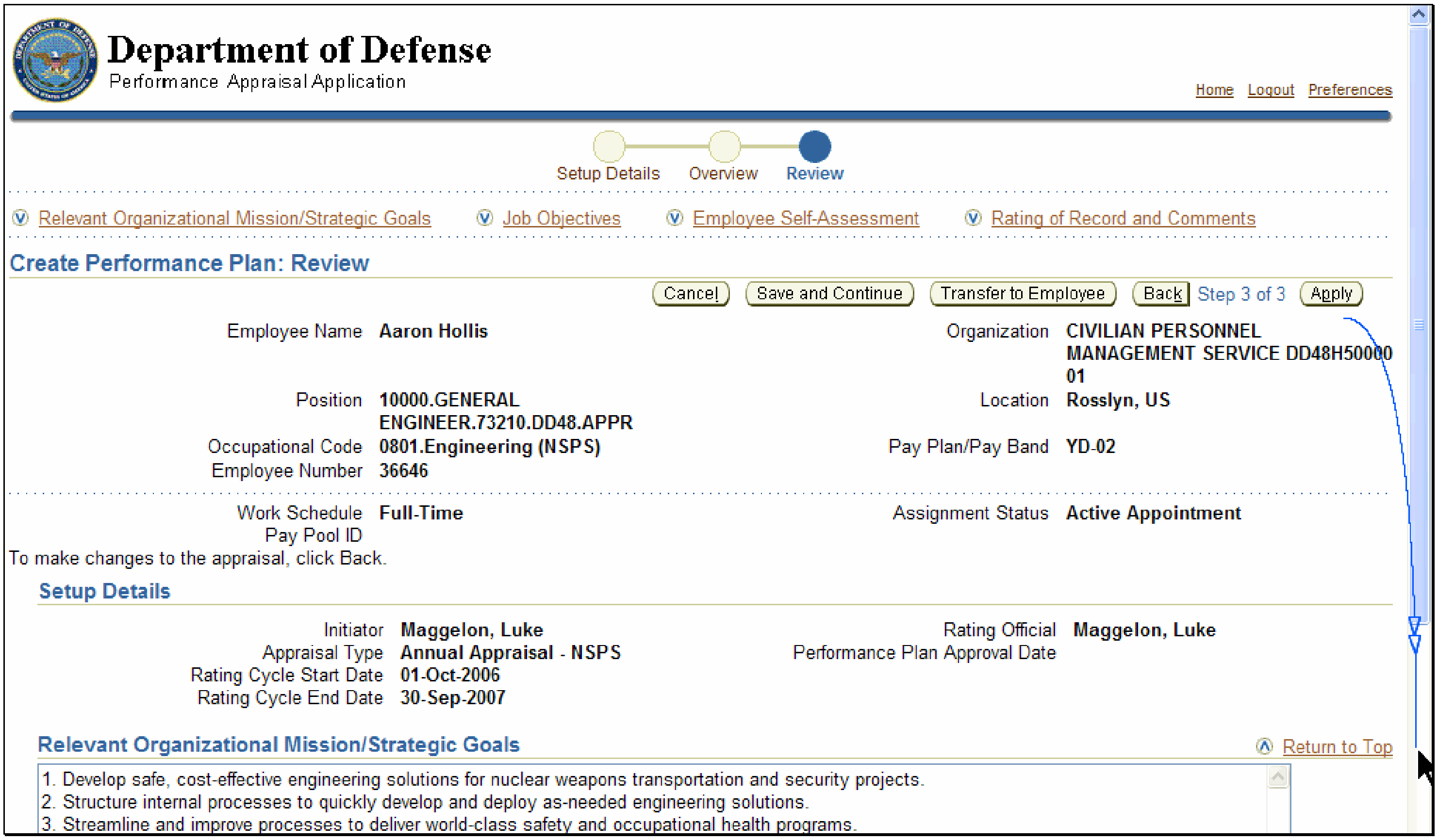
or Apply.

For the purpose of this overview, he selects **Apply**.



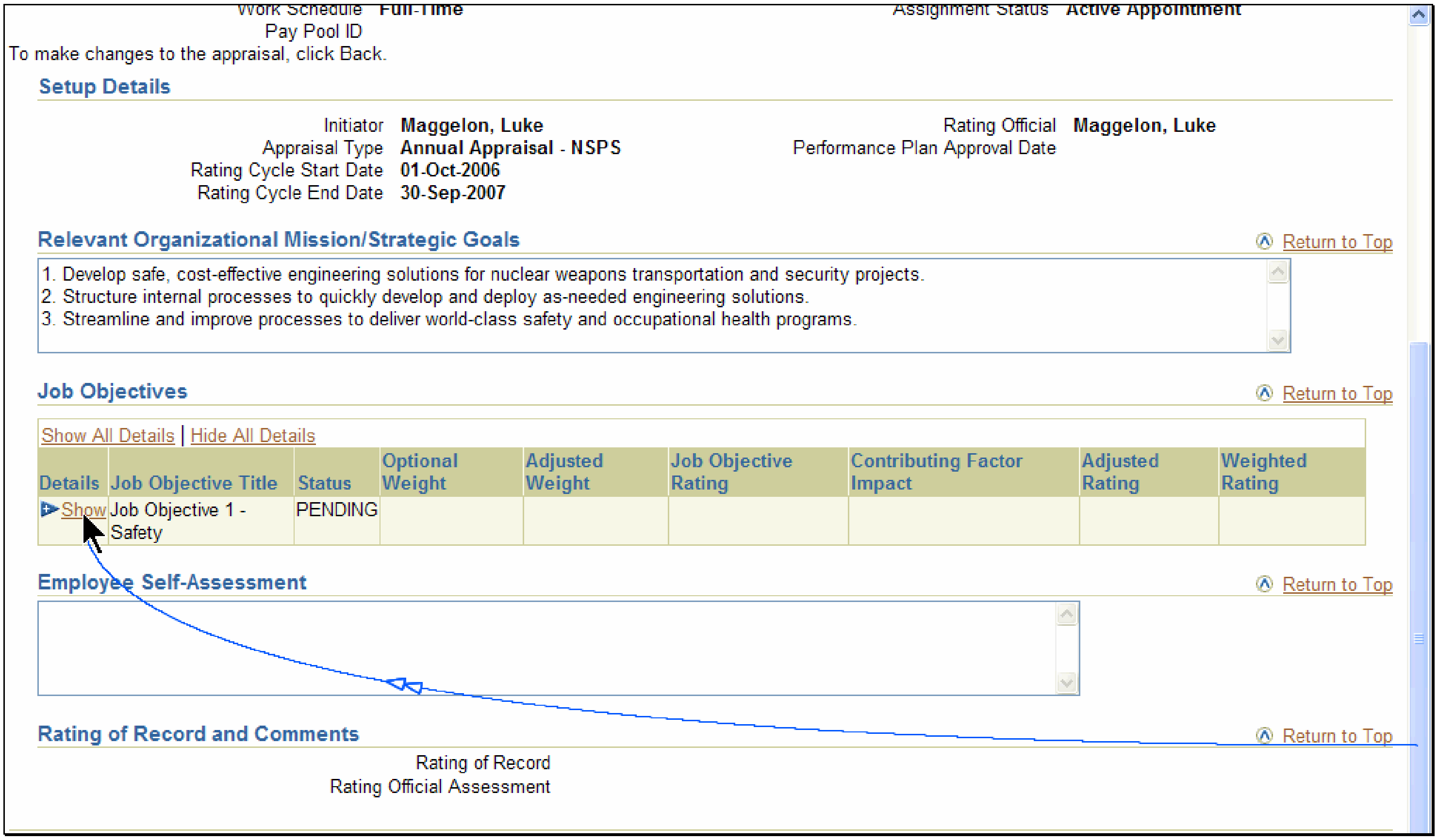

**Text Captions**

Selecting Apply returns Luke to the Overview page. From here, he can continue to step 3, Review, by selecting **Next**.




**Text Captions**

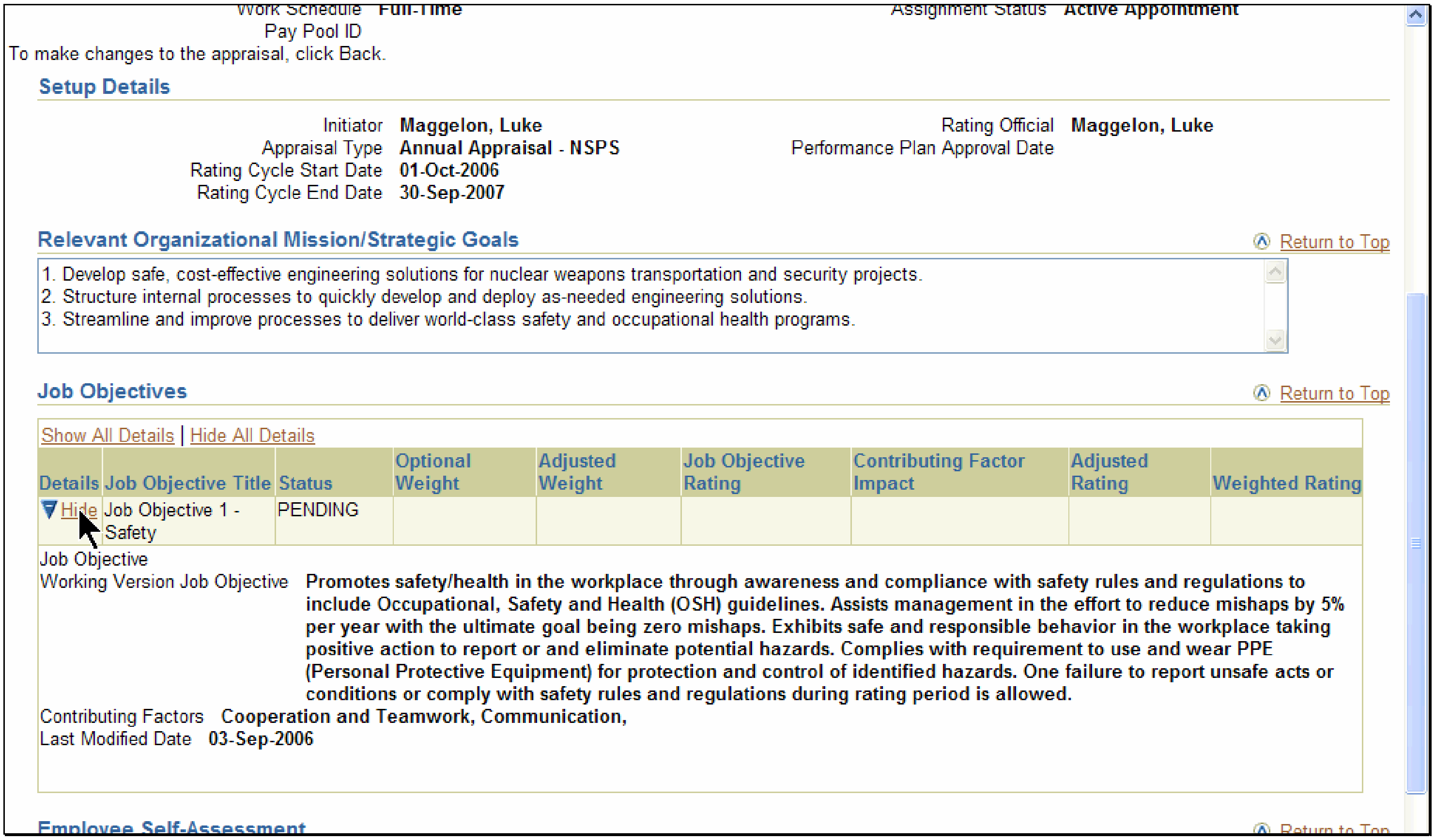
During the Review step, Luke reviews the performance plan for accuracy. Please note that in the Review step, information may not be updated or edited.




**Text Captions**

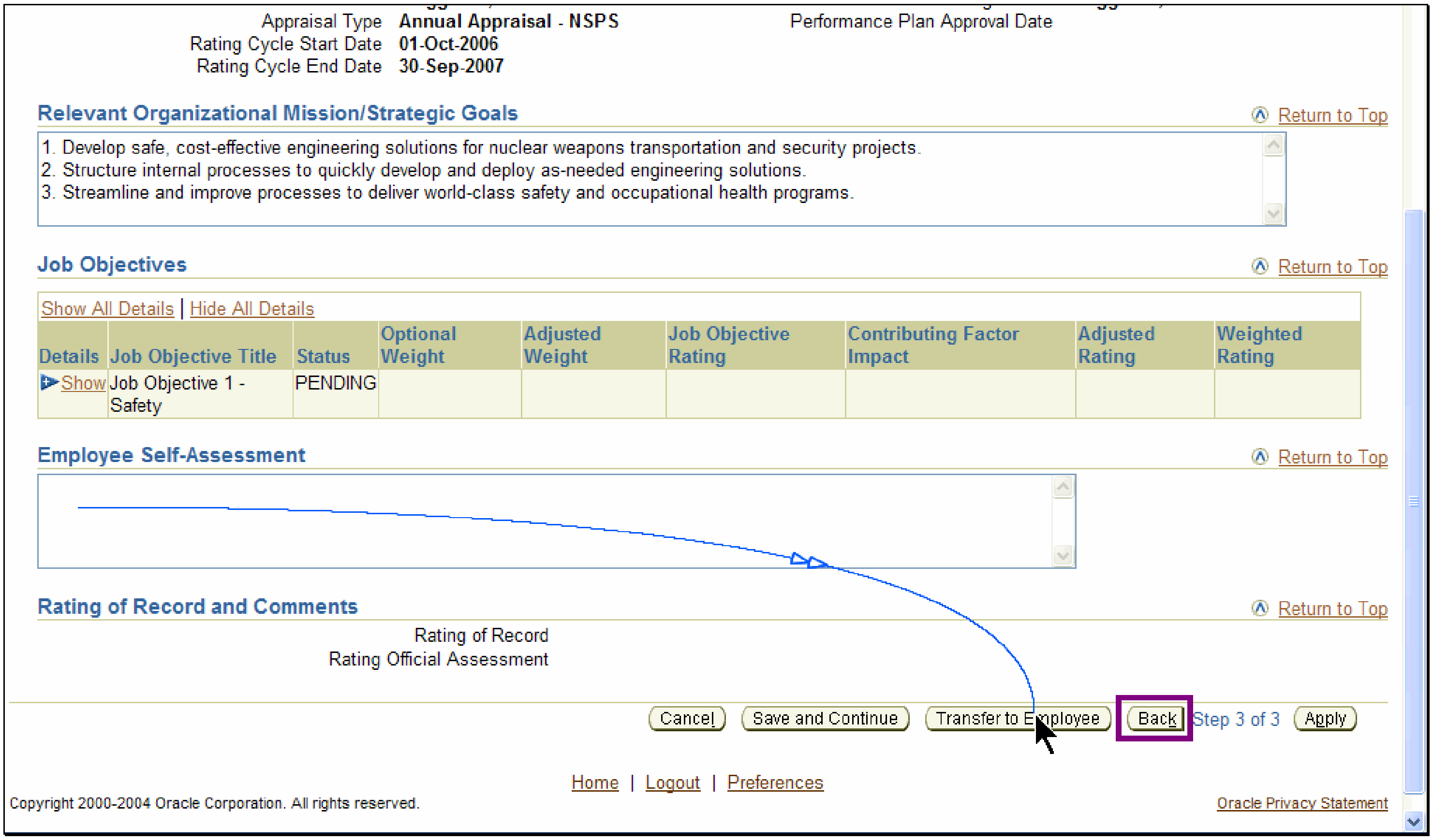
Also note that the Review step carries over information from steps 1 and 2.

To view a job objective, Luke selects **Show** and the job objective is displayed.




**Text Captions**

To return to the review screen, he selects **Hide** and the information is collapsed.

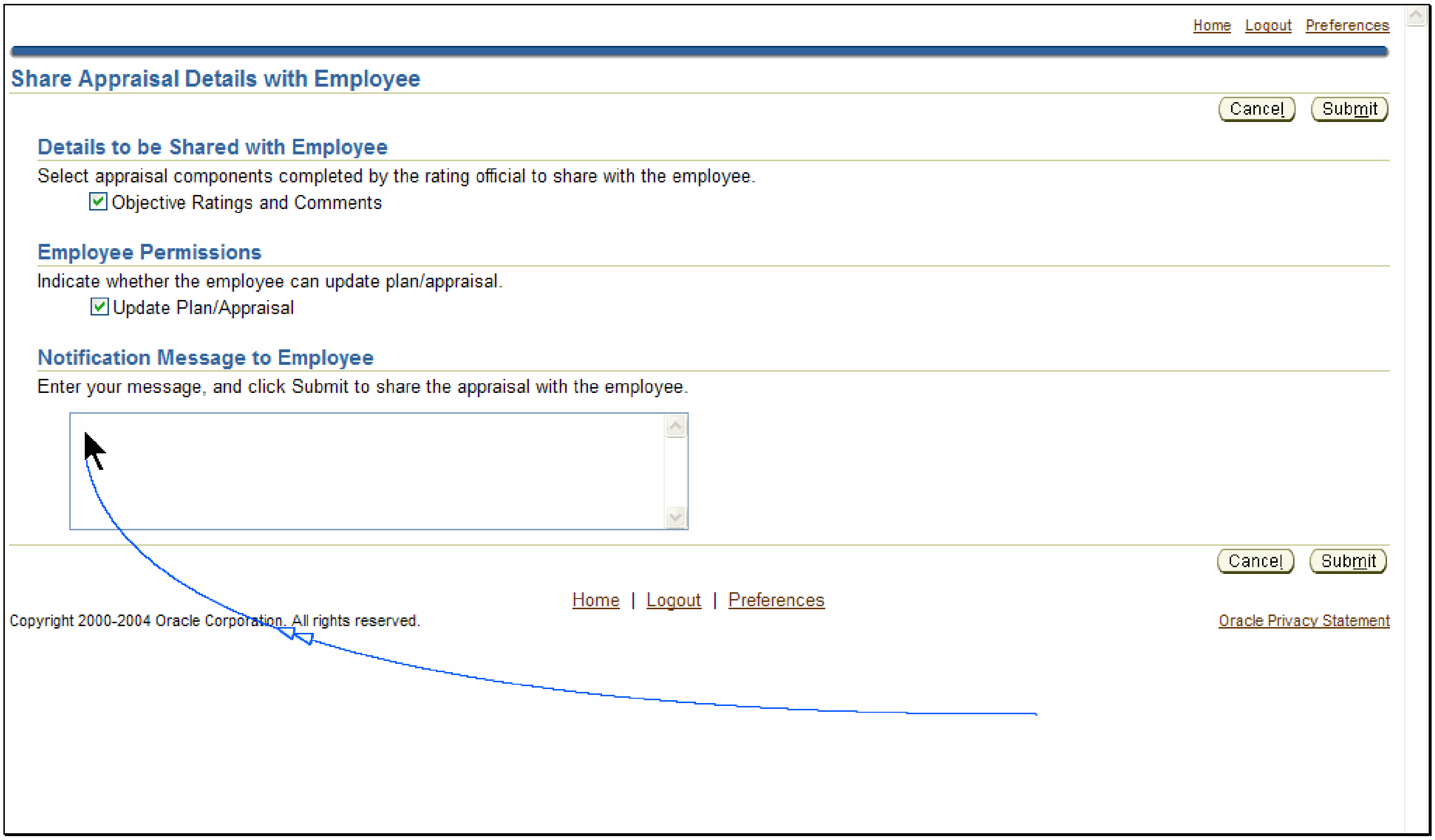



**Text Captions**

To update information, he selects the **Back** button to return to step 2, Overview, and follows the same process detailed under step 2 to update or edit information.

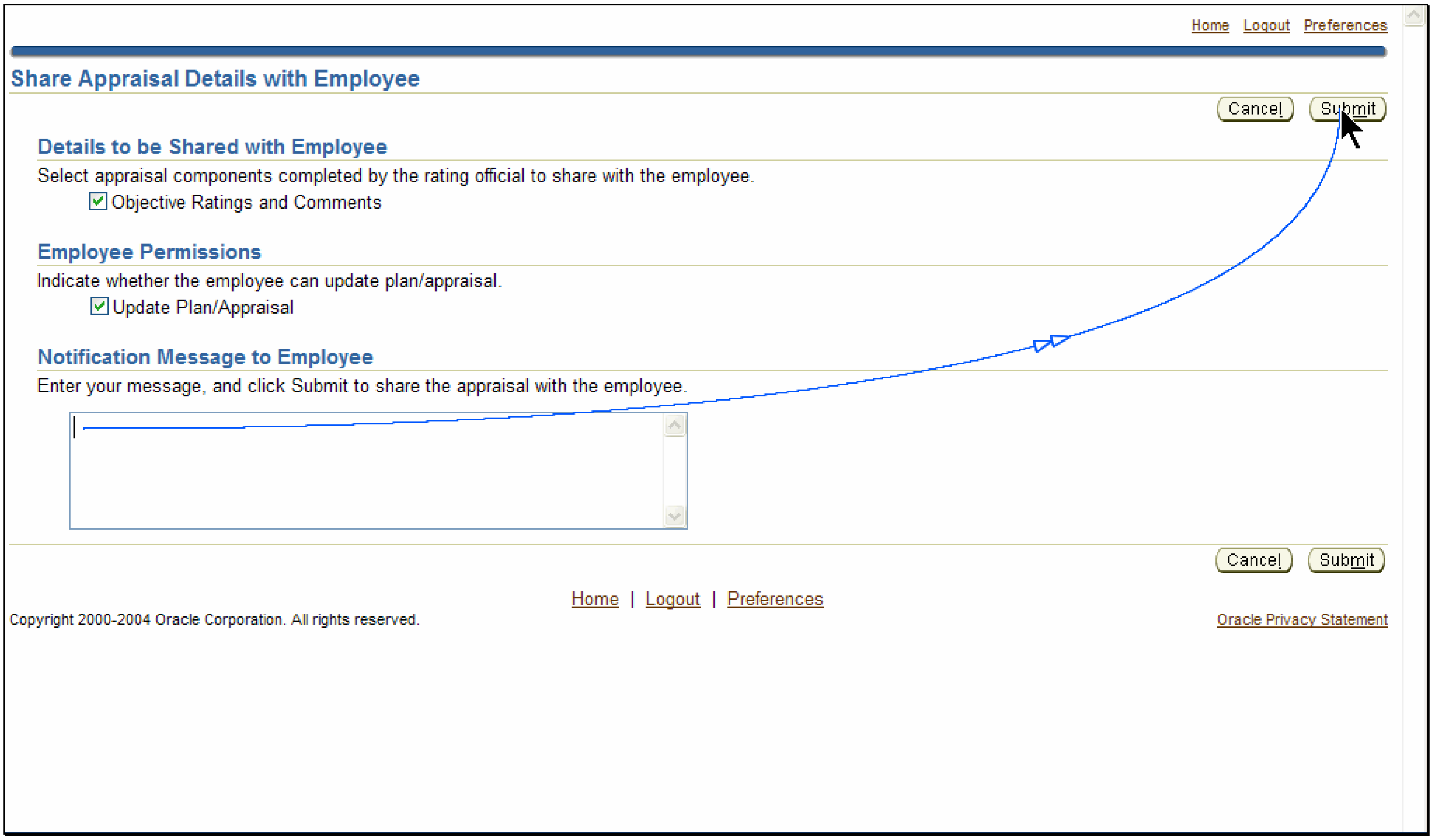
At this point, Luke is ready to transfer the performance plan to Aaron for review and comment. Keep in mind that the transfer can occur at any time during the performance cycle.

He selects **Transfer to Employee**.




**Text Captions**

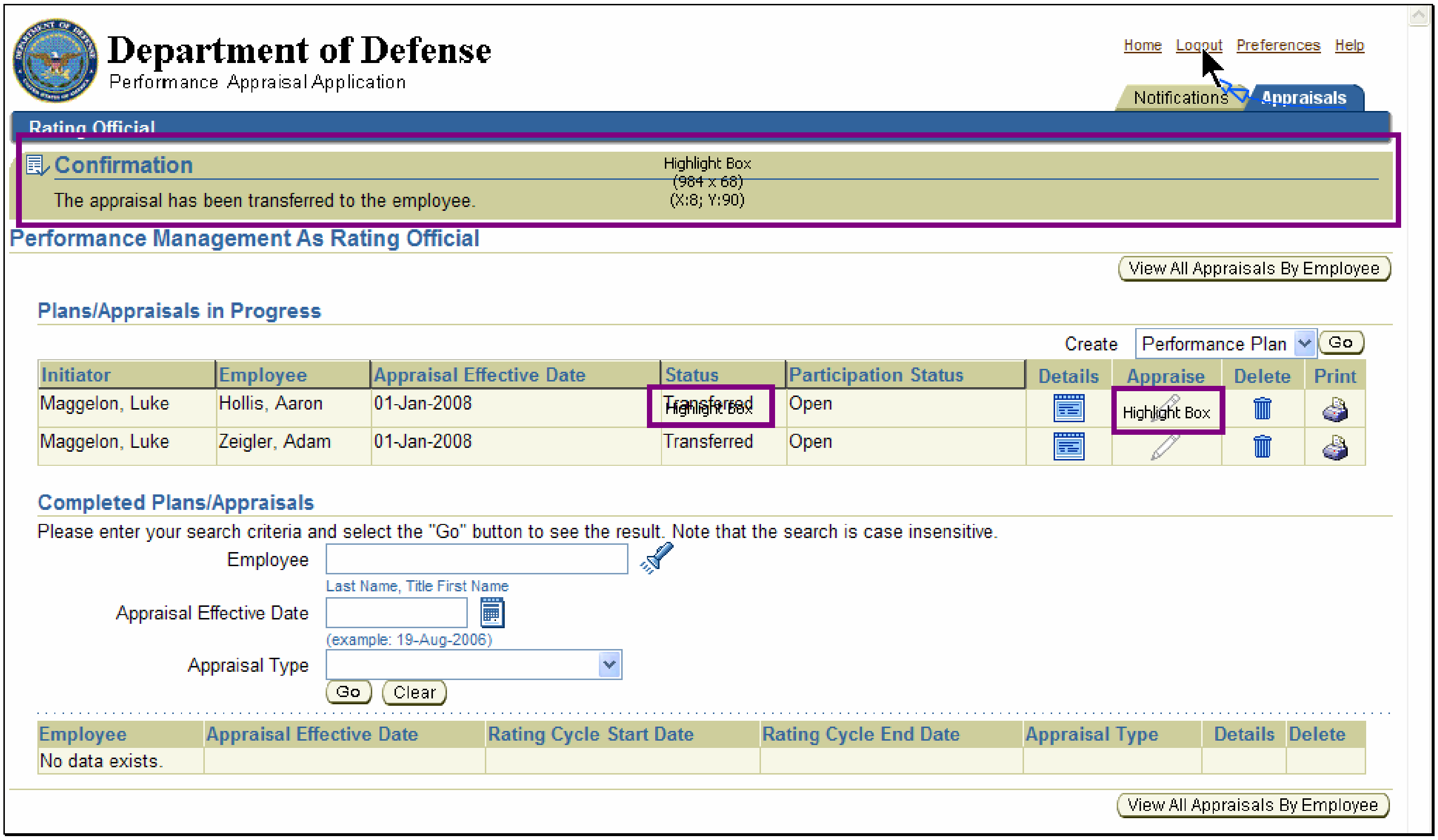
He enters his comments to Aaron under **Notification Message to Employee**. The message will appear in Aaron's notification under the Notifications tab.




**Text Captions**

He enters his comments to Aaron under **Notification Message to Employee**. The message will appear in Aaron's notification under the Notifcation tab.

When Luke is finished, he selects **Submit**, and the plan is transferred.



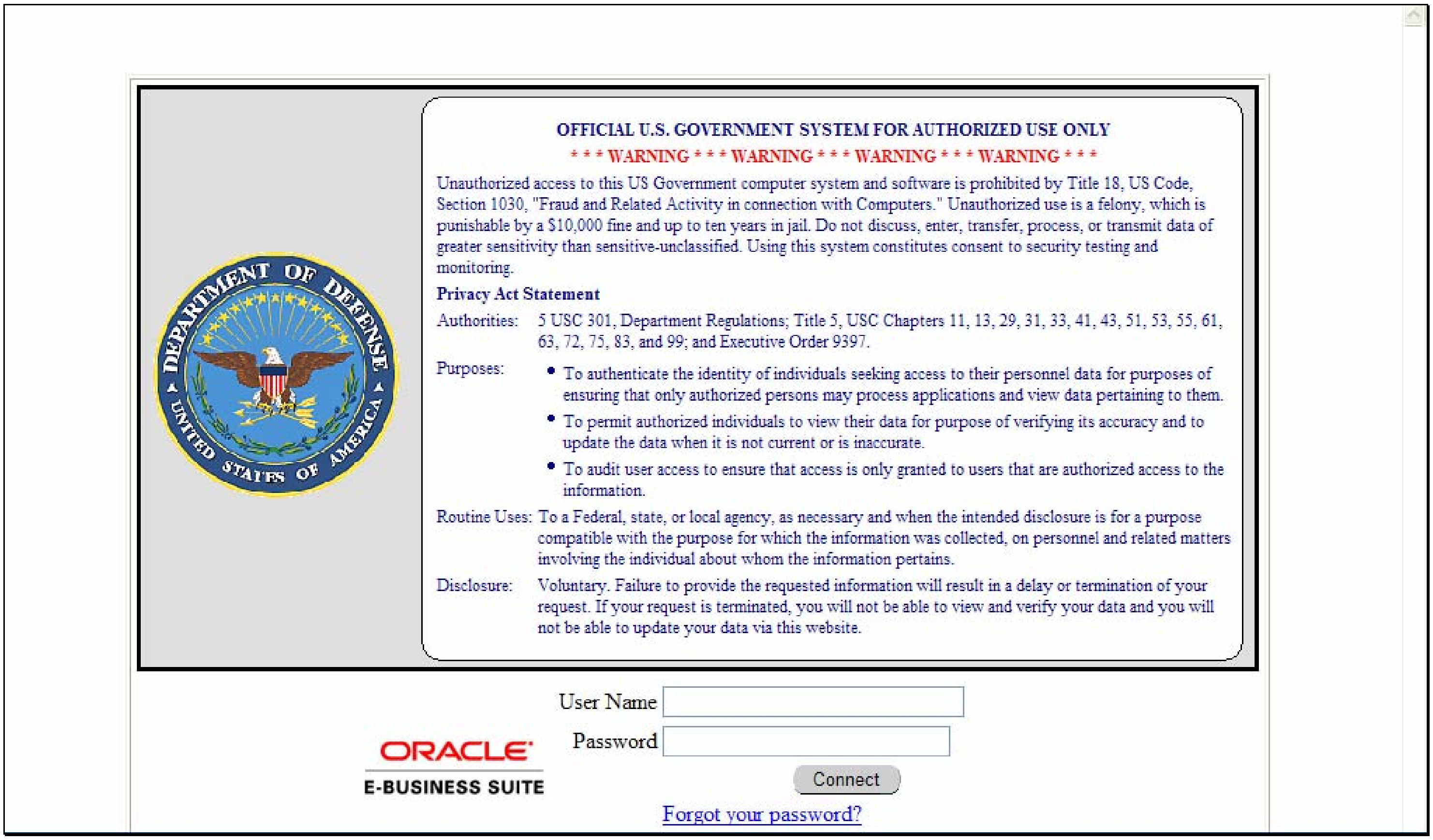

**Text Captions**

Under Confirmation, a note is given to indicate that the plan has been successfully transferred.

Note that the status shows “Transferred,” and the Appraise Pencil icon is no longer highlighted, because the ownership of the plan has been transferred from Luke to Aaron.

Here's a tip: it is a good idea to send your employee an e-mail to let him or her know that the plan has been transferred for his or her review.

As a rating official, Luke has completed the performance planning process until Aaron reviews the plan and provides feedback. Luke selects **Logout** to end the session.




**Text Captions**

As a rating official, Luke has completed the performance planning process until Aaron reviews the plan and provides feedback. Luke selects **Logout** to end the session.